



Middlesex University

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Institute for Work Based Learning

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Project Title

The effect of packaging on the sales of fresh milk in Cyprus

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- Survey

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M.A WORK BASED LEARNING STUDIES

MODULE WBS 4861

Project Title

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Summary

The fresh milk sold in Cyprus comes from organized cattle farms, is collected, is transported to the processing plants in refrigerated stainless steel tanks and owing to the small distances, the milk is transported to the processing plants in maximum 2-3 hours.

The processing plants in Cyprus are all HACCP certified and use similar pasteurizing methods.

The above mean that the fresh milk sold by the four processors is of the same quality and due to regulations of the Ministry and of Commerce and Industry, the milk is sold at the same prices.

The fresh milk companies can only increase their market share by adding some innovation in their product offering. The innovation which is used relates to the packaging of fresh milk which was made possible after the companies stopped selling fresh milk in glass bottles and adopted plastic bottles and the paper tetra-pack package.

From the literature reviewed carried out in the context of this project, revealed how fresh milk marketers can use the packaging to gain competitive advantage. Some of the successful packaging ideas involved such parameters as size, shape, colours, wordings and other features. In order to discover what features to include in the design of the fresh milk packaging, qualitative and quantitative research was undertaken.

Three specially selected focus groups discussed possible ways and arrived to definite suggestions which are given in chapters 4 and 5 of this project report.

The quantitative research carried out amongst 800 fresh milk users was a telephone survey which had the objective to find out in what ways the packaging affects the sales of fresh milk and what design changes must be made which are originated from the consumers and not from the professional designers.

Owing to the large size of the representative sample who took part in the telephone survey, the conclusions reached have a very high degree of validity.

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Chapter 1

Introduction and objectives of the project

1. introduction

People have been drinking milk since 7000 B.C when animals (cows, camels, goats) were domesticated.. Milk products from dairy cattle were produced from the 4th century B.C but they did not constitute a large part of the diet.

Milk consumption became common in almost all countries of the world in the last 500 years. The rapid increase in consumption in Europe came after 1863 when Luis Pasteur invented pasteurization, a method of killing harmful bacteria in milk. A second boost in milk consumption came in 1884 when Klervey Thatcher invented the first glass milk bottle which was sealed by waxed. Paper milk cartons were introduced commercially as a consequence of their invention by Victor W Farris.

In most developing countries individual farmers have small quantities of milk which cannot be marketed. In some countries Producer co-operatives developed which facilitated farmers to collect. Chill and transfer their milk to urban dairies which packaged and distributed it in to the consumer in milk bottles made of glass.

In the developed western countries and in USA milk marketing has become very competitive and milk producers sell their milk to either the processors who produce a variety of cheeses or to milk distributors who pasteurize , package and sell it as fresh milk.

Since pasteurized fresh milk comes from the same sources and cannot be differentiated in terms of product quality the challenge for the marketer is how to differentiate the fresh milk of his company from that of the competitor companies by using all the elements of the marketing mix (Product, Price, Place, Packaging, and Promotion). Packaging appears to be one of the marketing mix elements which can be used to differentiate one fresh milk distributing company from its competitors.

Consequently this project examines how packaging can be used to increase the sales of one brand and differentiate the market shares of the various competitors.

The importance of packaging has increased due to the expansion of supermarkets and self-service outlets. Since more than 80% of all products purchasing decisions are made in the stores the package of a product is the only means to bring to the eyes of the customer the product. To do this, packaging must have certain characteristics which will be specified

through the project work which I will carry out in the context of this project and involves an appropriate literature search of secondary sources and marketing research of primary consisting of focus groups and quantitative and qualitative research.

More specifically the project aim is to identify the consumers' expectation from fresh milk packaging and how the various package characteristics influence the perception of the consumer in positioning the product against competition.

The project will be carried out in the Cypriot environment for milk which has become very competitive in the past ten years. Until 1961 the only manufacturer selling fresh milk was Charalambides Dairies. In 1961 a Limassol company Christis entered the market and obtained a 20% share of the market. In 2002 the Cyprus Coca-Cola distributors launched its own label fresh milk gaining 35%-40% share of the market. This company used a non-returnable plastic bottle whereas the other two companies used a Tetra Pack package.

At present there are three national and one local company distributing fresh milk in plastic bottles and Tetra-pack. Despite the fact that the two of the three national milk distributors belong to same group of companies there is intensive completion between the three nation brands (Charalambides Christies and Lanitis) and there is a constant fight for the consumers' choice. and the increase of the respective market shares.

The increase in the market shares will be determined by the increase in the promotion (mainly advertising) expenditures but I will try to support that the design of the fresh milk packaging is the critical factor which will determine eventually market shares.

2. Objectives of the project

The main aims and objectives of the project are as follows:

2.1 Main aims

The aim of the project is through literature search and through quantitative and qualitative research to gain an in-depth understanding of the role of fresh milk packaging in the consumers' purchase decision process.

The research will aim to identify the consumers' expectations from the fresh milk packaging and which and how the various characteristics of fresh milk packaging influence the perception of the consumer to select one product against the competition.

The findings of the proposed project will have a wider applicability especially for goods which are bought in self-service stores. Since packaging seem to be the most important factor

which influences in – store purchases the understanding of how the packaging characteristics affect the customer decision process will give a competitive advantage to companies producing fast moving consumer goods sold in the stores. The challenge to their organizations will be how to design packages that appeal to the consumer preferences.

2.2 Main Research Objectives

The research which will be carried out will have the following objectives:

1. Identify which factors influence the consumers' purchase decision in the fresh milk industry.
2. Find out the role and impact of packaging in the decision making process for the fresh milk.
3. Identify the characteristics of packaging which affect the consumers buy fresh milk in the stores.

In order to achieve these I propose to carry out a survey, with telephone interviews with a representative number of consumers who live in all parts of Cyprus. Before carrying out the survey I will moderate three focus groups to help me to formulate the questions for the quantitative survey.

One aspect which I will research in great depth is an actual change in milk packaging which took place recently in order to find out whether the consumers were influenced to change their milk brand by the change in the packaging of milk of one particular brand.

In order to achieve the above objectives I propose to carry out a survey with telephone interviews with a representative number of consumers living in Cyprus.

The telephone quantitative survey will be augmented with three focus groups and with literature analysis which, I believe, are the most reliable challenging and appropriate research techniques. Using this type of triangulation I am confident that my methodology is robust and double checks the validity and reliability of the data collected and of the survey results.

The main research questions which will form the basis of the telephone survey and the discussions in the focus groups are the following:

- What factors influences the consumers' purchasing decisions in the fresh milk industry.
- Which elements of the marketing mix (product ,price , place ,promotion) affect the purchasing decision for fresh milk.

- Bearing in mind that there is little differentiation in Cyprus in the marketing mix of the three major competitors, the marketing emphasis is on the fifth element of the marketing mix which is packaging

- What aspects of the fresh milk packaging influence the
 - (a) Attention level of a brand
 - (b) Perceived value
 - (c) Brand preferences
 - (d) Brand positioning

Chapter 2

Literature review

In the past twenty years revolutionary changes were made in the way products are produced and sold. Especially in the FMCG (Fast Moving Consumer Goods) sector the development of self-service and the increase in competition the fight to gain the consumers' choice is becoming more and more aggressive. Many authors (Verklm 1989, Schlossberg 1990) support that most consumers make their purchasing decision in the store at the point of sale of the specific product category. The marketers are struggling to provide products/brands that would catch the consumers' attention and on the other side consumers are trying to decide which product/brand meets their expectations better. This battle has brought to light the importance of packaging. As (Underwood 2003) supports a strong and effective packaging would stand out and "catch" the eye of the consumer resulting in the differentiation of products. A recent study conducted in New York on beverages revealed that packaging significantly affects positively consumer preferences for brands such as Coca – Cola and Sprite and affects negatively the corresponding products of Pepsi.

In a self-service environment packaging is the most important communication medium. As (Bahaeghel 1991 and Peters 1994) packaging is a most important medium because:

- It reaches the vast majority of buyers in the category
- It is present at the crucial point where consumers make their purchase decisions
- Consumers' are actively involved with packaging as they examined it to gain all the relevant information they need.

Since everybody seems to agree that the packaging affects consumers' choice of brands it follows that we must try to understand how consumers choose products and brands.

The starting point of our literature review is a theory which explains how we choose in a book in the Essential Psychology Series written by Mary Tuck (1976). In the book the most important theories which try to explain consumer behavior are discussed criticized and tested empirically. These are:

- (a) Simulation equations on computers by Franjesco Nicosia
- (b) The work of Engel Kolat and Blakwell who have produced the most widely used textbook in Business Schools on consumer behavior.
- (c) The work of Howard and Shelt whose book The Theory of Buyer Behavior published in 1969 remain the most up-to-date in the field.

Narrowing down our literature review we examine the marketers' views of what influences the consumers to buy. The traditional marketing theory of the 4Ps (Product, Price, Place, Promotion) and the 4Qs (Object, Objective, Operation and Organization) have been proved inadequate when the consumer tries to examine how they chose fast moving consumer goods in a self – service environment. Nevertheless the 5th P (Packaging) which was added the new dimension of conspicuous investment added in the explanation of objectivity by Veblen mentioned in Mary Tuck (1976) have helped us to understand the importance of packaging especially when we offer advice to the package designers.

As some authors suggest (Kotler 1972) the concept of packaging developed in line with the developments in marketing. To the two basic objectives of packaging protection and economy a third dimension was added, convenience. This means size options and packages that are easy to open. With the advent of the self – service and the increase in affluence a fourth objective, promotion was added. In a self – service store the packaging must attract attention, describe the products' features, give the consumer confidence and make a favorable overall impression. Affluent people are prepared to pay a little more for convenience, appearance, dependability and prestige.

In the absence of specific empirical research on the importance of packaging in consumer decisions for fresh milk we cite a study made for drugstores in 1970 reported in the September 1970 issue of Sales Management . More than 38% of the housewives interviewed said that the package design had a great influence on their choice of brand and 30% said that they switched brand for a better package.

Amongst the hundreds of articles on the internet on the role of packaging design I single out an article by Laura Denman an expert in assisting organizations in moving and positioning products through innovative and compelling package design solutions.

In this article written in August 2008 the author reviews four key packaging attributes which are essential in packaging decisions. These are Innovation, Visibility, Content and Appeal.

Innovation: Differentiates your product from its shelf neighbors by discovering what attributes they possess in order to design for difference

Visibility The benefits you add to your product to be visible and comprehensible to the would be customers.

Content: Place your product in the environment it deserves so that it will be perceived as a quality product.

Appeal: The combination of the attributes innovation, visibility and content. It is this attribute which makes a product leap from the shelf to your shopping basket.

Regarding practical pack design for milk we refer to recent article down loaded from the internet by Lars G. Walledin with the title The Ultimate Milk Pack Design. The author sets four pre-conditions which are necessary before a good pack design can be made. These are;

- The brand must have a CLEAR position
- The packaging design must have an idea/concept
- The design must be viewed in a wider concept i.e part of the total communication

After saying that the ultimate pack depends on the type of pack (shape material etc) the cultural environment and trade channel proposed to treat each part of the design separately .Walladins nine parts are the following;

1. Colors to chose
2. Brand
3. Milk symbols
4. Freshness
5. Natural
6. Useful information
7. Storytelling
8. Local
9. Differentiation

The glass bottle which played a great role to promote home delivery of milk but did not allow much imagination in design was gradually displaced by ;

Plastic e.g. ECOCLEAN

Carton e.g. Tetra pack

The nine parts took a more practical orientation as follows

1. **COLORS:** The author proposes that the best color for a milk pack is no color I.e. white as the product. If too little white is used the product will not look fresh. If too much white and the product will have little shelf impact. The second color recommended is either spring green or light sky-blue. It is asserted by the author that more than 80% of all milk packages have the above three colors with the addition of red in order to increase impact and to inform of something special.
2. **BRAND:** The brand name should be integrated on the pack with the three colors so that after some time the brand can be associated with the color and vice-versa.
3. **MILK SYMBOLS:** Symbols such as a cow's head, a bell, a milk splash, a green field should be integrated in the design.
4. **FRESHNESS:** Freshness comes from the color schemes green fields and grass
5. **NATURAL/PURITY** usually denoted by a quality seal and words such as 100% pure
6. **USEFUL INFORMATION :** Used to distinguish the different types of fresh milk e.g. light calcium content . This can be done by words or symbols or both. The author suggests that the tetra-pack offers the facility to write information either about the milk or information of great interest ,not necessarily about milk .An example of these is Arla in Sweden and the corn-flakes packs.
7. **STORY TELLING.** Again on tetra-pack a small story can be written. A good example is the Danube yoghurt in France
8. **LOCAL .** The idea is that the more local the fresher is perceived
9. **DIFFERENTIATION** This refers to differentiation of different types of fresh milk(light, lactose free,) or differentiation from competitors
10. **DESIGN.** Obviously not all of the above can be integrated on a fresh milk pack and is necessary for a fresh milk producer to assign to a designer to choose what ideas to adopt for the pack,

A recent article (02/10/2013)written by Michael Stanat ,Research Executive at SIS International Research Company with the title Packaging; The last ten seconds of Marketing. The author after reviewing articles on empirical research on aspects of packaging seven with examples from the fast moving goods marketing the following seven rules for good packaging;

-Good packaging must reflect product benefits which reflects the customers purchasing and use of the product. For example McDonalds is emphasizing food quality now with boxes emphasizing how high quality the food is and V8 is making their packaging fit into the vending machines

-Unique shapes, structures and delivery systems help differentiated products from competitors. Research has found that good packaging contributes to convenience which improves customer satisfaction. One example is «Simple Orange»juice presented in a carafe bottle generating a premium price Another example is Imperial Sugar Company's «Redi-Measure»brown sugar cup – packets which enable the user to measure accurately and avoid wastages.

-Packaging should include the brand's personality with branding and characters. An example is Toucan Sam which indicates product benefits like Fruit Flavors

-Packaging needs to highlight compelling and believable claims on product differences. An example is some cereals proclaiming that they use organic ingredients and no preservatives

- Direct comparisons to a competitor product can be effective. An example is a cereal to claim that it has 50% more milk than another product.

-Packaging is read at the left and right corners of packaging. Reassuring claims to be put in these corners while primary claims are put in the center. Fewer words are better as consumers tend to look at images and visuals rather than words

-Effective packaging can target «rejuveniles»are middle aged people young at heart and somewhat nostalgic. The packaging is kid- like and has bright graphics.

Chapter 3

Methodology

This chapter explains how the project subject was investigated and why particular methods and techniques were employed. It also describes the procedures, size of sample, methods of data collection, choice of variables tests of measurements and statistical analysis.

3.1 Research Approach

In order to select the best research approach for carrying out this project I reviewed the most commonly used approaches for collecting the quantitative and qualitative information required. As Judith (Bell 1999) stated <<by understanding the major advantages and disadvantages of each approach helps to select the most appropriate methodology for the task in hand>>.

One commonly used method of classifying research approaches is to separate them into quantitative and qualitative researches collect facts and study the relationship of one set of facts to another. Qualitative researches are more concern to understand individuals' perceptions of the world.

Researches adopting a qualitative perspective seek insight rather than statistical analysis.

The general methodology used in any research approach according to Wirsma (1995) is divided into qualitative and quantitative research although it is difficult to define exactly the two terms suffice to day that qualitative research describes phenomena in words instead of numbers or measures and quantitative research describes phenomena in numbers and measures instead of words.

It is important to say that the two words are not reflecting as two opposite terms. They have their usefulness in all surveys and it is up to the researcher to decide according to the objectives of the research which method to use and which combination of the two.

One other way of looking at the two terms is whether the research is required to measure the reaction of many people to a limited set of questions thus facilitating comparison and statistical aggregation of measure or whether the research is required to research an event in great depth in order to gain an understanding about the why people do something.

I do not agree with the researchers who support the carrying out both qualitative and quantitative methods in order to get better results. I support that we must select the best approach for each case considering the financial side also. This of course does not mean that, it appropriate, the qualitative researcher should not draw from quantitative techniques and vice versa.

3.2 The Survey

A survey is a way of obtaining information from a large number of persons using more – or less the same questions usually the survey aims to collect information from a representative selection of the population and provided the sample was truly representative the results are representative of the whole population.

The researcher undertaking a survey can use many mechanisms such as personal postal and telephone questionnaires interviews observations focus groups in order to collect information from a representative number of persons.

As Bell (1999) stated << surveys can provide answers to the questions what where when or how but is not easy to find out why. Casual relationships can rarely, if ever be proved by the survey method. The main emphasis is on fact finding and if a survey is well structured and piloted it can be a relatively cheap and quick way of obtaining information>>.

Advantages of the survey method

- Many questions can be asked about a given topic giving considerable flexibility to the analysis
- Gives the opportunity to the researcher also to identify the source of change in terms of the specific individuals who are changing
- Is a cheap and quick way of obtaining information
- Can be administered from a remote location using e-mail or telephone.
Consequently very large samples are feasible making the results statistical significant even when analyzing multiple variables
- Ask standardized question when make measurement more precise by enforcing uniform definitions upon the participants and ensure that similar data can be collected from groups and then interpreted comparatively.

Disadvantages of the Survey

- The survey is inflexible in the sense that it requires the initial study design to remain unchanged throughout the data collection
- The response rate to the questionnaire is never very satisfactory especially with the postal questionnaires.
- Participants find it hard to recall information or answer hypothetical questions.

3.3 Case Study

The other research approach which I initially considered was the case study. Case studies allow for focus on a specific group of interest. The limitation which I found for this approach was the

fact that the findings would not easily be accepted to other situations. The role of packaging is an issue that influences a broad sector of the business sector ion general, thus the case study would not allow for general application of findings.

3.4 Experiment

The final research approach that I considered was the experiment. Experiments include testing a situation under artificial or simulated environment. In my case I had to study different subjects 'consumers' and how different package designs ' variables' affect purchase decision is not one that can be controlled. The external factor that do influence consumers' choice are so complex and varied that cannot be simulated in an artificial environment. Thus the findings of my research would have been biased and invalid.

3.5 Action Research

As Action Research is an approach which is appropriate in any context when <<specific>> knowledge is required for a specific problem in a specific situation or when a new approach is to be grafted on to existing system (Cohen and Manion 1994) I did not consider it as appropriate for my project.

3.6 Data Collection Methods

The researcher can use a variety of data collection techniques and in each case selects the ones which have reliability and validity. The choice also depends on the research approach chosen and the time and resources available to the researcher.

In the framework of the survey research approach which I have chosen due to the complexity of understanding the role of packaging in the consumers' purchase decision process multiple concepts and methods will be used (triangulation approach).

The reason triangulation adopted for the purposes of this study is due to the limitations of any single technique of data collection or conceptual methodological framework to understand and analyze the complexity of the consumers' needs and expectations. Using multiple techniques of data collection ensures the validity of the findings and at the same time builds the researchers' confidence.

For the purposes of this project I will be using the following data collection techniques:

- Literature Review
- Questionnaires
- Focus Groups

3.6.1 Literature Review

The starting point for my data collection will be the literature review. It is extremely important and relevant to know all literature that is directly related to my proposed project. The analysis of findings of other researchers, marketers, academic and other practitioners on the subject of interest is crucial. I believe that I will be gaining a better understanding of my proposed by studying the work/research of others on the same topic.

My literature review will include the following areas:

- Marketing
- Packaging
 - The role of packaging
 - Package design and purchase behavior
 - Aspect of packaging (shape, color, etc.)
 - Consumer cognitive psychology
 - Psychoanalysis
 - Structuralism
- Consumer behavior
- Consumer purchase decision process

3.6.2 Questionnaires

One of the most widely used techniques for data collection is the questionnaires Baxter et al (2003). The purpose of the questionnaire is to gather the required data from the specified target population. Questionnaires are relatively inexpensive when it is necessary to reach a large number of respondents. Often the questionnaire is the only feasible way to achieve a number of respondents large enough to allow statistical analysis of results which are statistically significant.

Although questionnaires may be cheap to administer compared to other data collection methods they are every bit as expensive in terms of design time and interpretation.

In order to design and administer a questionnaire it is necessary to:

- Define the observers of the study
- Identify the population
- Determine the sampling frame
- Write the questionnaire
- Pilot testing of the questionnaires
- Administer the questionnaire
- Analysis and interpretation of results

The questionnaire will be structured with a number of both closed and open ended questions. The close ended questions will be pre coded while the open ended questions will allow for any further information to be collected.

In order to ensure the validity of the results, a pilot testing will take place in order to ensure that the questions are clear to the respondents and that the level of bias is minimized. All the respondents that will be selected to complete the questionnaire will first be questioned if any accept to take part in the study. (see appendix 1). The respondents personal information will not be disclosed, this complies with ESOMARS International Code of Ethics.

3.6.3 Focus Groups

The focus groups encourage selected participants to express different perceptions and points of view on the topic of discussion (Krueger 1988). The group discussion is conducted several times with similar types of participants to identify trends and patterns. The advantage of using focus groups for my proposed project is that it allows me to study and understand the needs and expectations of consumers by using different projective techniques.

4 My role as a Worker / Researcher

My role as Research Director and founder of my company is to work closely with our clients, to always provide them with business solutions for their problems or dilemmas, to find new business opportunities for growth, and most importantly to satisfy and retain their customers and at the same time to attract new customers. I have managed to build strong relationships with my clients based on trust and commitment. I strongly believe that market research is a booming industry that will always play a key role in business decisions. Ongoing research is vital for the success of any business since it allows for planning and preparation for the future, as it is supported by Wilson A (2006). The key questions that should always be answered are 'what else does the customer need' and 'how will the customer react or behave'. Basically it all comes down to understanding consumer's purchase behavior and how that behavior could act for the best interest of our clients. Apart from my role of managing the company, my day to day work includes the following:

- Receiving a research brief from the client regarding the research objectives
- Preparing an analytical proposal describing the recommended research methods, sample size, timing and cost
- Designing the research project: methodology and questionnaire design
- Training to field supervisors and research executives / managers
- Analyzing data

- Preparation of report and its presentation to the client
- Providing recommendations to the client
- Evaluation of the implementation of the research results
- Overall management of the project

I am aware of all possible conflicts that may arise from my dual role as a worker / researcher. In order to eliminate any possible bias to the results I will try to be as objective and reflexive as possible and cross check my findings with different literature reviews, research methodologies, techniques and approaches. I will also work closely with all the different parties involved in my project and always receive feedback and crosschecking the findings.

5 Project Requirements Knowledge and understanding

Knowledge

The proposed project will study the role packaging in the consumers' purchase decision making process. With 17 years experience in market research I have gained the relevant knowledge that will aid me in conducting the proposed project. My leadership skills along with my strong analytical and presentations skills will allow me to demonstrate the relevance of the findings to organizations' profitability.

Research Capability

For the purpose of the project I will be using different research methods that aim in answering the research objective of the proposed project. I intend to include different research objective of the proposed project. I intend to include different research techniques such as literature and document review, questionnaires, interviews and focus groups. Both research families will be utilized in my proposed project. My experience as researcher allows me to select the most appropriate research method, approach and technique that will yield the most valid outcome. I have worked on many important research projects that had as a result the selection of a new product design. I was the project leader in all projects undertaken. I have gained a very strong understanding if how the need for a new package design arises and whether or not the market place is ready to adapt the design. I have also broadened my learning for developing these new package designs by working closely with my friends.

I have helped a number of my clients to identify new market opportunities for developing new package designs by working closely with my clients.

6 Ethical Understanding

I have a clear understanding of the ethical aspects and confidentiality issues that must be applied in any research situation. All steps of the research will comply with ESOMAR's Code of Ethics. I will make sure that all participants selected to take part in my proposed research will be given the right to refuse or withdraw from the research at any given time. All the personal information of the respondents will not be released.

7 How does the study satisfy academic requirements of validity and reliability

I have taken into consideration the likely affects of bounded rationality for this project. They are unavoidable. However, being aware of these limitations has helped me keep my mind clear as to possible shortcomings and deficiencies of the project.

I'm aware that the limits set by all the influences mentioned in the previous chapter are bound to affect the project. However as the data I am planning to collect will satisfy the academic requirements of validity and reliability due to the sampling method used and the multifaceted approach I am confident that the University as a stakeholder of my project will be satisfied with my approach and results.

The outcome of the project will contribute to the understanding of the companies on the fresh milk industry about the important role of packaging in influencing the consumer to choose a particular brand.

Finally considering other practical issues such as financial feasibility of the project I consider that the cost of carrying out the survey was not high as apart from the cost of the telephone interviews all the other work was carried out by me.

Chapter 4

Project Activity

4.1 Project Activities

Project activity is not simply the procedure which describes the various aspects of the research but includes such activities as:

- Negotiating with various stakeholders of the project which include companies of the Fast Consumer Goods Sector and companies of the fresh milk sector.
- Ethical issues involving the respondents who provided information for the survey.
- Requirements of the University for grading me my master's degree.

4.2 Action Plan

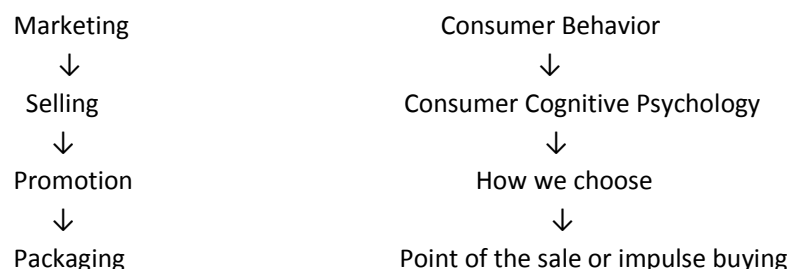
In order to manage to complete the project within the set time deadlines I have prepared an Action Plan which listed all the activities to be carried out. The Action Plan was then adapted into Gant chart with the critical path and time – scale so that the activities will be carried out in the correct sequence and time constraints.

This plan enables me to move smoothly through the various stages of the project to the end.

4.3 Literature Review

This part of the project was very demanding in time and knowledge since as it follows from the project title there are key areas which need to be backed by theoretical knowledge from the fields of Marketing ,Consumer Behavior and Purchasing Decision Process. Also the researcher must have detailed knowledge about the Fast Moving Consumer Goods field and the fresh milk industry.

I used the "funnel" approach starting from the general subjects of Marketing Consumer Behavior and narrow them down as follows.



↘ ↙ Change of Brand

4.4 Population and Sampling Frame

Since it was decided that for the quantitative survey the telephone questionnaire will be used a suitable sample will be selected from the total population aged 18-65 years old. The sampling method to be used is the stratified random sampling method. Specifically the sample will be broken down into specific age groups taking into account the gender, city and area based on of the official publication of the population census of the statistical service of the Republic of Cyprus. In total a 1000 interviews will be contacted. The number of interviews is very satisfactory taking into consideration the sampling error and the confidence level of the results.

For the qualitative survey 3 focus groups will be conducted with consumers. Each focus group will consist of 7-9 housewives. The first focus group will be composed of housewives with ages 19-39. The second focus group will be composed of housewives with ages 40-60 and the third focus group will be composed of housewives with ages 19-60 . The idea behind having these three focus groups is to seek any differences in the purchasing habits of house wives belonging in the two age groups.

The moderator will be the same for the three groups. Qualitative research when used with quantitative research can help to interpret and better understand the complex reality of a given situation and the implication of a quantitative data.

4.5 The questionnaire

The main aim of the questionnaire used for the quantitative survey was to find out whether the package design affected the purchasing of fresh milk and identify the characteristics which affect positively the consumer and persuade consumers to buy fresh milk. In order, however, to discover what really affects the consumers the questionnaire must be well designed. It must not include vague words, technical terms, jargon and suggestive and leading questions.

The design and administering of the questionnaire followed this sequence

- Defining the objectives of the survey
- Selecting the research approach
- Prepare the check-list for the focus groups
- Carry out the focus groups
- Determine the sampling frame

- Design the questionnaire for the quantitative survey using as inputs the information collected from the focus groups
- Collect and check the data for accuracy using the check questions
- Analysis of the data and interpretation of the results

4.6 Data Collection

Both the quantitative and the qualitative data collection were carried out by professional researchers, in order to avoid bias and obtain the best result.

4.7 Ensuring Validity and Reliability

In order to ensure validity and reliability of the research results the questionnaires were pilot tested and the interviewers went through a special training course. The supervisor of the quantitative survey did a random call back of 20% of each interviewer's work.

4.8 Data Analysis

The success of any survey depends on the ability of the researcher to analyze the collected data. All completed questionnaires will be edited, coded and entered in a statistical package QPSMR. QPSMR is highly specialized statistical package for consumer research. I will analyze the findings based on demographic characteristics such as age, gender, level of education, social class. The data will be processed and statistical tabled will be produced. I possess very strong analytical skills that allow me to analyze, interpret and verify the validity of the outcome. Furthermore, any additional cross tabulation that will help to further analyze the findings will be produced.

For the Focus Groups, all discussions were tape- recorded from which transcripts were produced. The transcripts were used for grouping the findings in common sections. Based on the research objective and the composition of each group an in-depth analysis will be made for each group separately. After the analysis of each group a mapping file will be produced distinguishing the main common findings amongst the different groups. The qualitative analysis is more complex and has a lot more input from the researcher. My experience in qualitative research and especially focus groups allows me to determine the significance of the results and to minimize my level of interference in the research outcome.

4.9 Bias

According to J. Bell's book (P.139) " there is always the danger of bias creeping into interview largely because, as Selltitz et al (1962:583) point out, interviewers are human beings and not machines and their manner may have an effect on the respondents".

It is well known that if someone has strong views about a subject, an interviewer has to be particularly careful about the form of the questions asked. In an interview you have the opportunity to "guide" the answer if you want to obtain the specific result. However if the interviewing is done professionally with a questionnaire which was constructed to avoid leading questions and other bias, the answers will be representative of how respondents feel, behave or react. It is obvious that the same problems can arise during a focus group procedure.

Having in my mind the above, I was very careful during the three focus groups, giving the same emphasis and speaking in the same tone when asking all questions, in order to be as unbiased as possible.

Chapter Five

Project Findings

In this chapter we present the findings of the deskwork and field research carried in this project in order to collect qualitative and quantified information about the effect of packaging on the purchasing decision, The theory and the empirical evidence of how packaging can affect the purchase decision which have been reviewed in the literature review helped the researcher to interpret the findings of the qualitative and quantitative research. In this part of the report I will present the findings of the qualitative research (Focus groups) and of the quantitative research (Questionnaires)

5.1 Focus groups discussions

The focus group discussions had as their primary aim to provide information for constructing the questionnaire and as a secondary aim to collect information useful for this project.

As I am, by profession, a market researcher and frequently I am asked to lead focus group discussions for clients of my company I decided to lead the discussion in these focus groups in a professional way having in mind the need of a practitioner researcher to avoid bias leaving aside any personal preconceptions. The approach used in the focus groups was the funnel approach starting with how packaging affects the sales of products in general and ending with whether packaging affects the sales of fresh milk and if so how.

In the first round of discussions in the focus groups participants were asked to talk freely about the functions of packaging. The answers given were the following;

- To preserve the product
- To protect the product from damage
- To make the product more attractive to the consumer
- To make it easier to transport, and store on the shelf or in the refrigerator of the consumer

The second round of discussion was devoted to discussions on the reasons why housewives buy consumer products .The answers given were quality ,price ,size ,shape, taste, I always buy the same product, recommendation from a friend, it catch my eye on the shelf.

In the third round of discussions focus group participants were prompted to discuss the importance for them of various packaging features such as size, shape, convenience, appearance, quality, and name.

The participants were then asked to focus the discussion on fresh milk discussing amongst other things milk quality, the reasons for buying, brands they know, brands they buy etc. They then were prompted to give r their views on fresh milk packaging such as type of packaging, comparison of plastic with paper tetra-pack and graphics and color.

The gist of the discussions in the focus groups is the following;

- Packaging is a very important element of the marketing mix
- Packaging is the successful salesman without a voice
- There is brand loyalty in the purchasing of fresh milk
- Packaging affects the purchase decisions
- Plastic bottles preferred more than tetra-pack
- Change in the packaging characteristics usually leads to fewer purchases
- Good attractive packaging increase impulse buying
- The majority of the focus group participants believe that all fresh milk
 - companies sell the same quality milk.

Comparing the views expressed in the three groups they were about the same with exception that the young housewives (19-39) had stronger views on the design of fresh milk packaging.

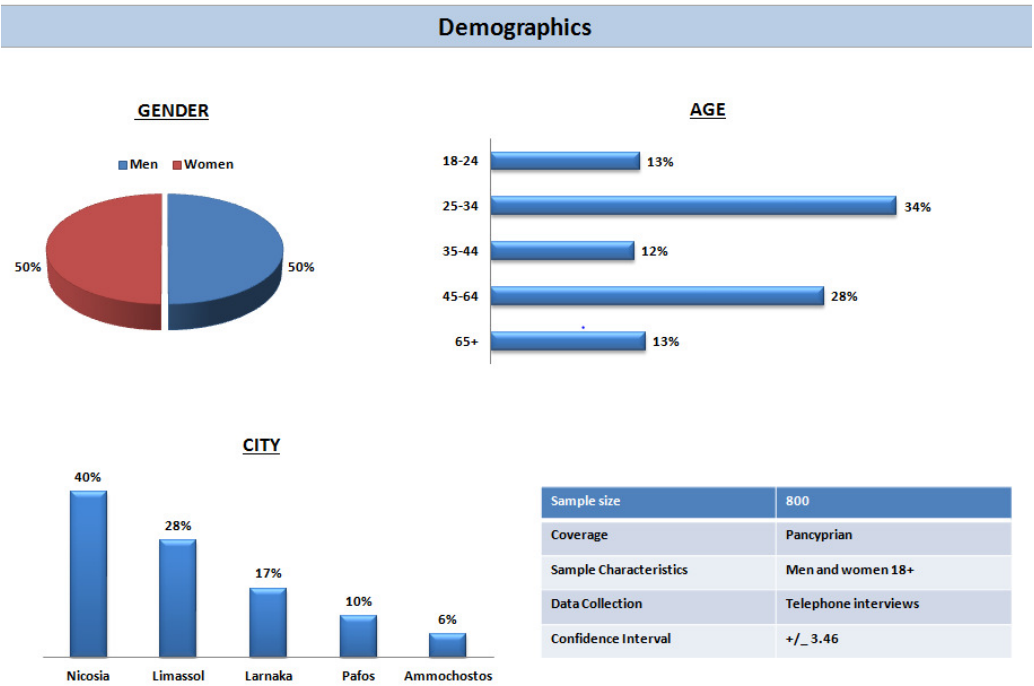
5.2 The questionnaire Survey

The quantitative information of the project which was collected with the use of a specially constructed questionnaire contributed to the triangulation of the data together with the information from the focus groups and the very interesting information of the literature review. Other important information inputs for the project was collected through personal visits to two fresh milk processors in Limassol and through personal observation in almost all supermarkets and major bakeries in the Nicosia .

As the field-work for the project was carried out certain changes in the fresh milk packaging took place which, however, we do not believe has affected the validity or reliability of the questionnaire research findings. One fresh milk processor put on the market a two liters plastic bottle similar to the one and half and the one liter bottle. Another fresh milk processor put on the market a two liter plastic container (I hesitate to describe it as a bottle) with a completely different shape and not see through plastic material .

The questionnaire used for the survey is given as Appendix I. The characteristics of the research and the analysis of the information collected, which was done with an appropriate computer program, is presented in summary on the next page:

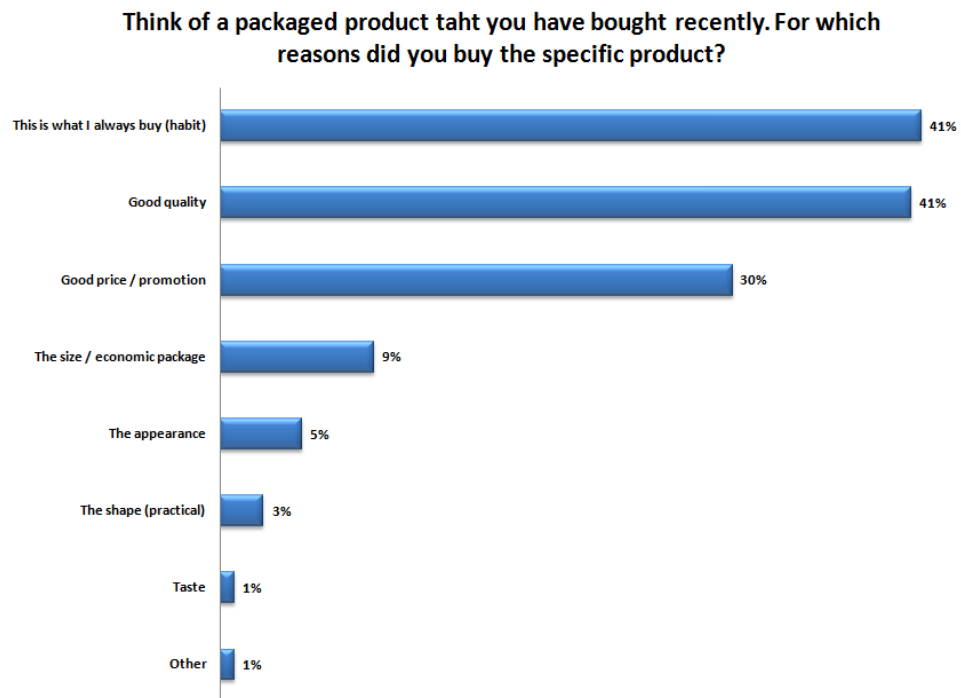
Demographis and characteristics of the research. These are shown in the table below:



A clearer picture of the characteristics is as follows:

Gender:	Age Groups:	Geographical Distribution
Men 50% Women 50%	18-24 13%	Nicosia 40%
	25-34 34%	Limassol 28%
	35-44 12%	Larnaka 17%
	45-64 28%	Pafos 10%
	65+ 13%	Ammo/stos 5%
Sample size: 800		
Coverage :Pancyprian		
Sample characteristics: Men & Women 18+		
Data collection : Telephone interviews		
Confidence interval: +/- 3.46		

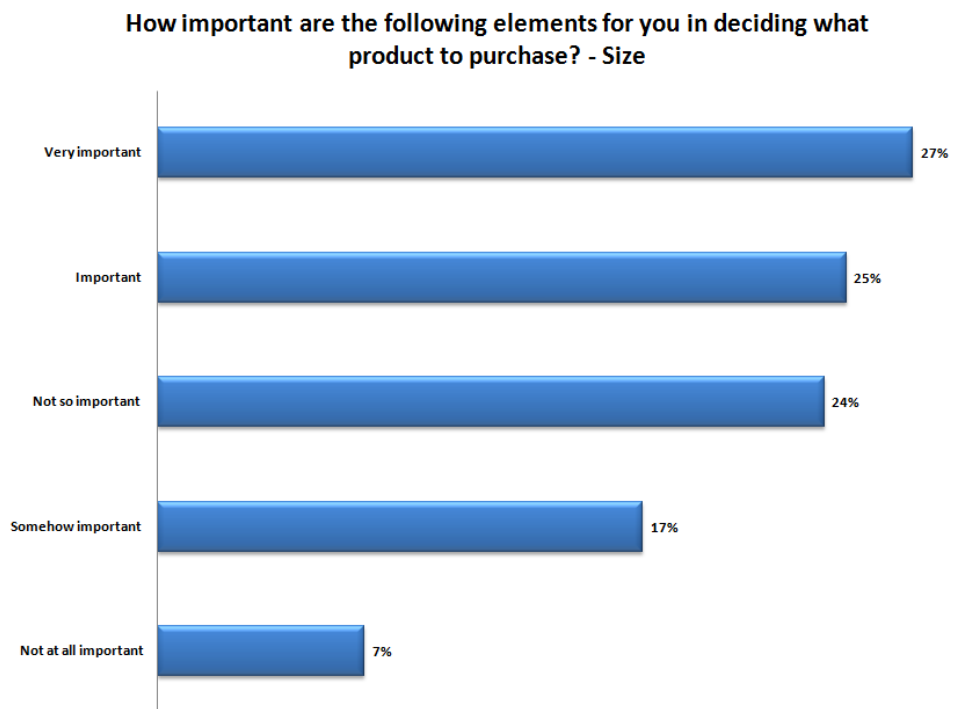
QUESTION 1 : The answers given are shown in the diagram below



As it can be seen from the diagram 41% of the persons interviewed bought the product out of habit (this is what I always buy) The same percentage gave as their reason for buying the product as the good quality. Thirty percent of interviewees gave as their reason the price (it is probable that the product was promoted on that day with a lower price)

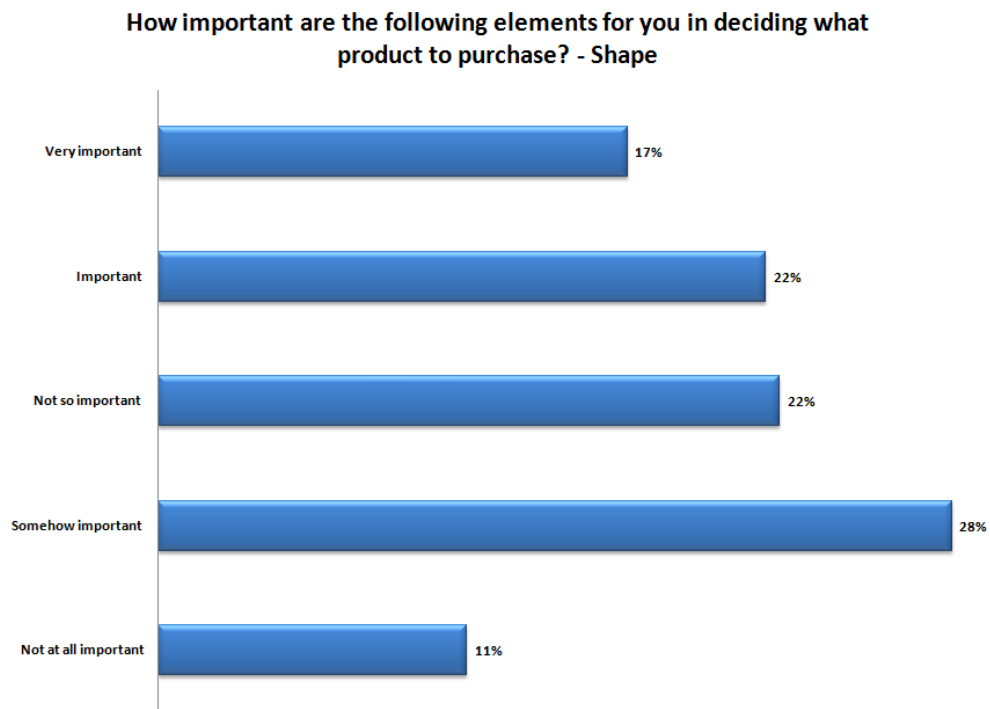
The percentage of interviewees whose answers relate to packaging was 17% (size/economy package 9%, appearance 5% and the practical shape 3%)

QUESTION 2 : The answers are given in the table below:



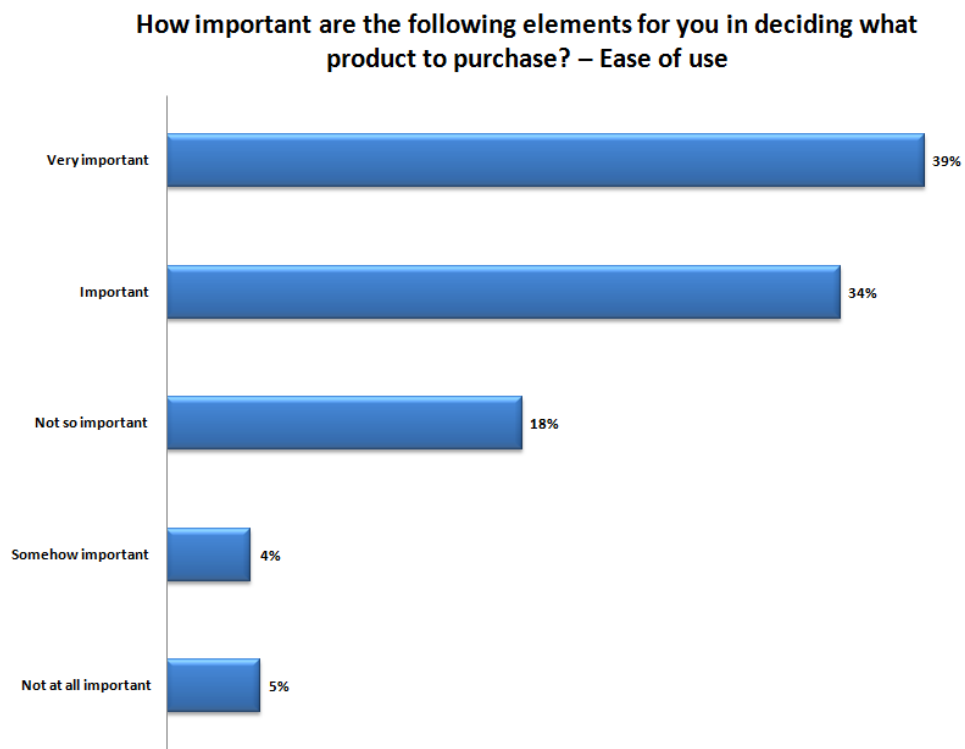
Just over 50% of interviewees consider SIZE of the packaged product as important and very important. Another 24% of interviewees consider size as some how important. Only 7% of interviewees considered size as not at all important.

QUESTION 3: The answers of the interviewees are given in the table blow :



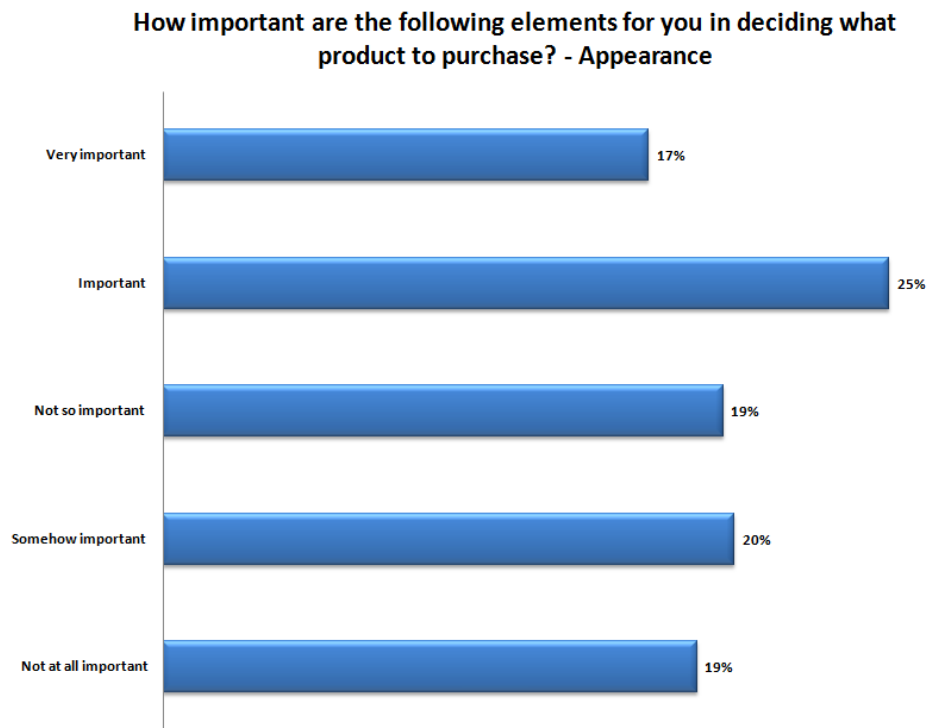
Only 39% of all interviewees consider shape as important and very important where as an equal percentage (39%) consider it as somehow important or not at all important

QUESTION 4 : The answers of the interviewees are given in the table below:



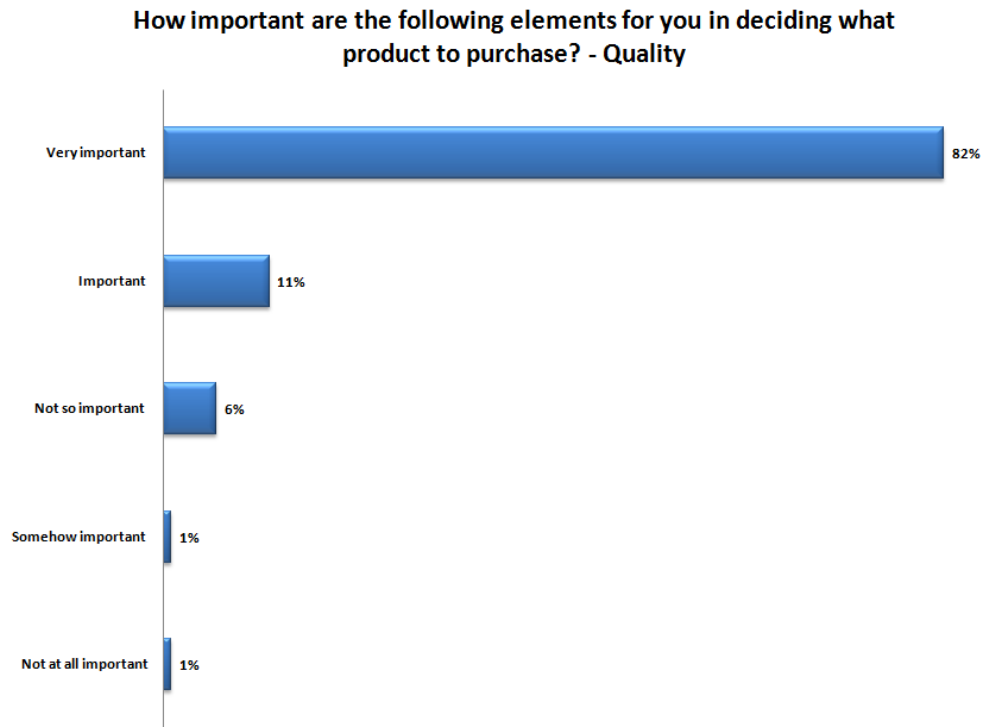
Seventy three percent of the interviewees consider the element Ease of use as very important and important whereas only 5% consider it as not at all important

QUESTION 5 :The answers of the interviewees are given in the table below:



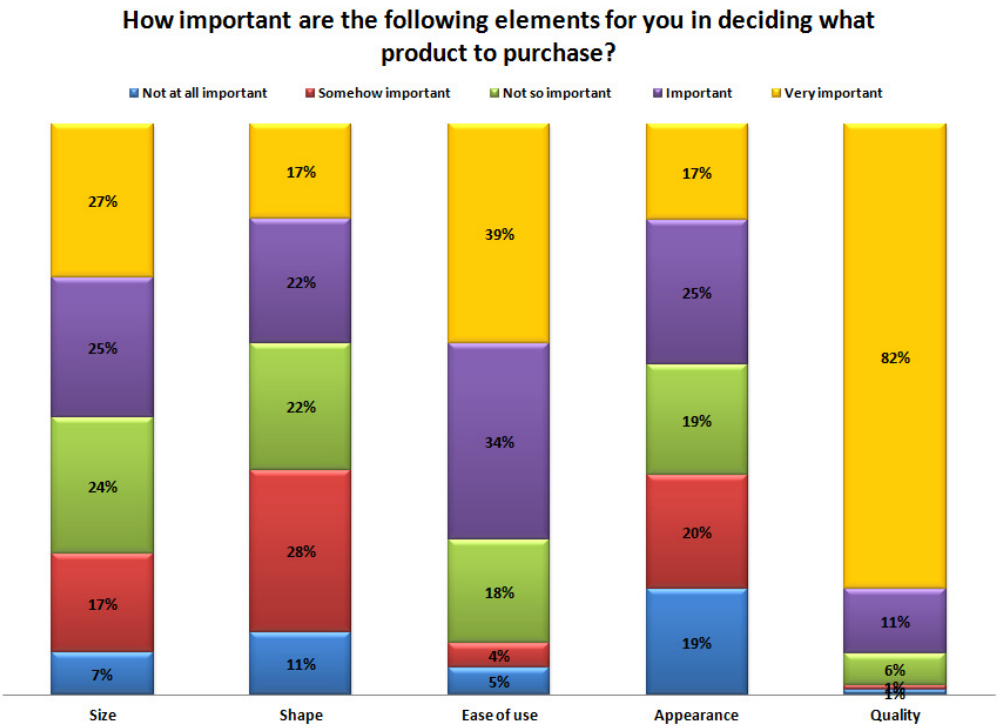
The analysis shows that interviewees divided themselves more or less equally amongst the five factors of this element.

QUESTION 6 : The answers of the interviewees are given in the table below



The vast majority of the interviewees (89%) consider the element as very important and only 1% not at all important.

QUESTION 7 : BELOW IS A PICTORIAL PRESENTATION OF ALL FIVE ELEMENTS (SIZE SHAPE EASE OF USE APPEARANCE ANDQUALITY)



Comments have already been made above.

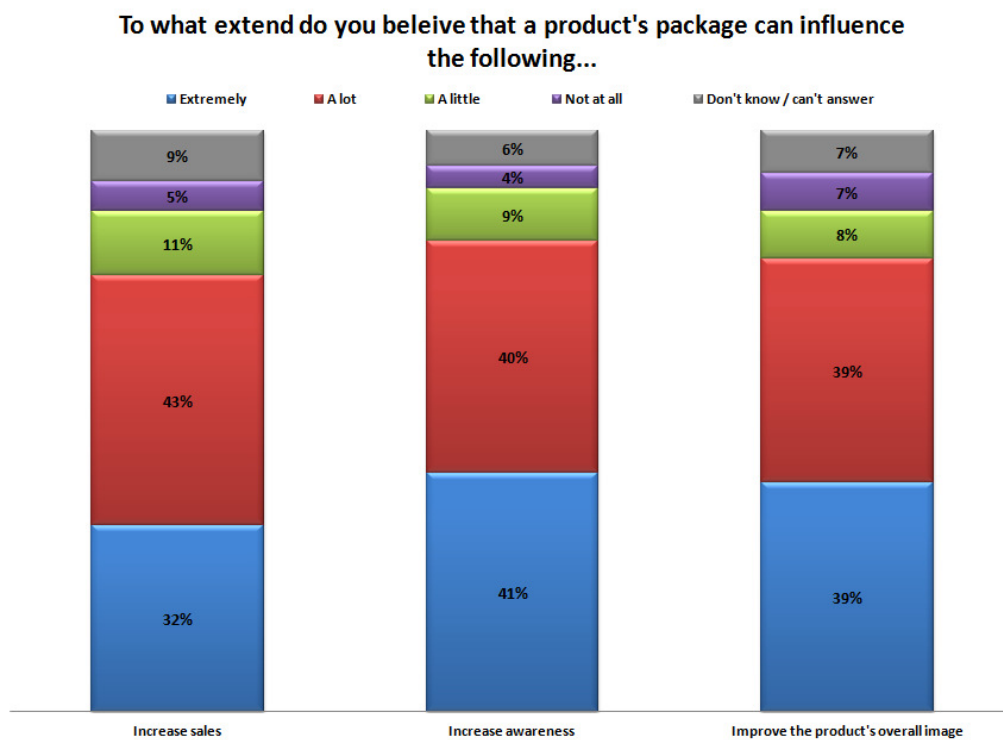
QUESTION 8 :To what extend do you believe that a product's package can influence the

-increase in sales

-increase awareness

-improve the product's overall image

The respective percentages are showed in the table below



The extreme and a lot percentages for the three elements are as follows:

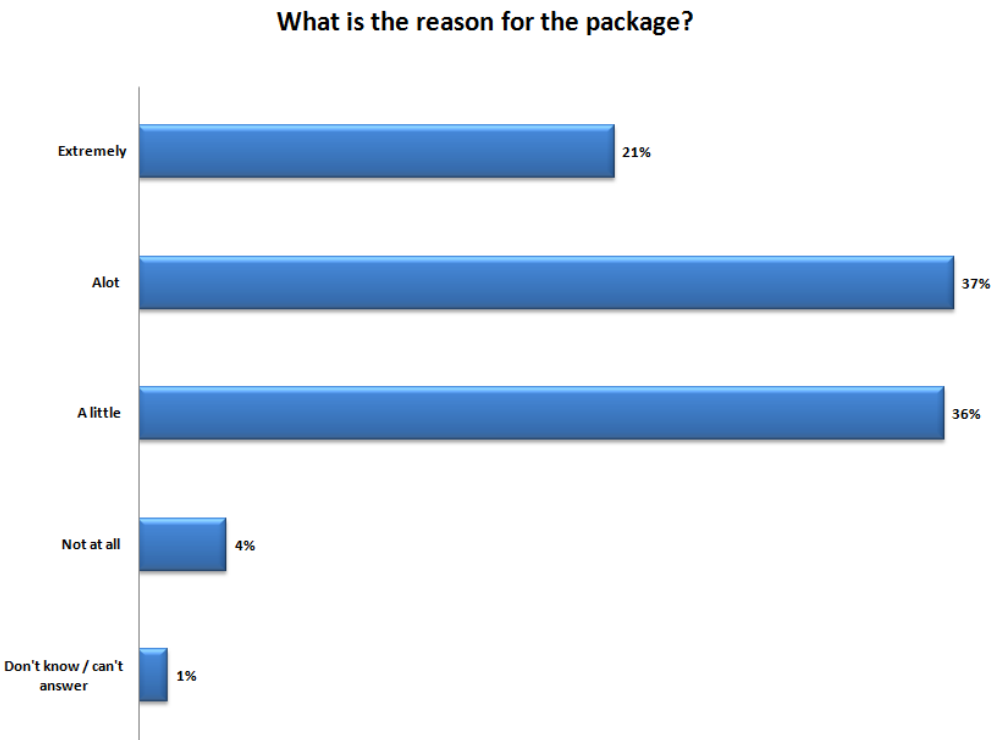
Increase in sales 75%

Increase awareness 81%

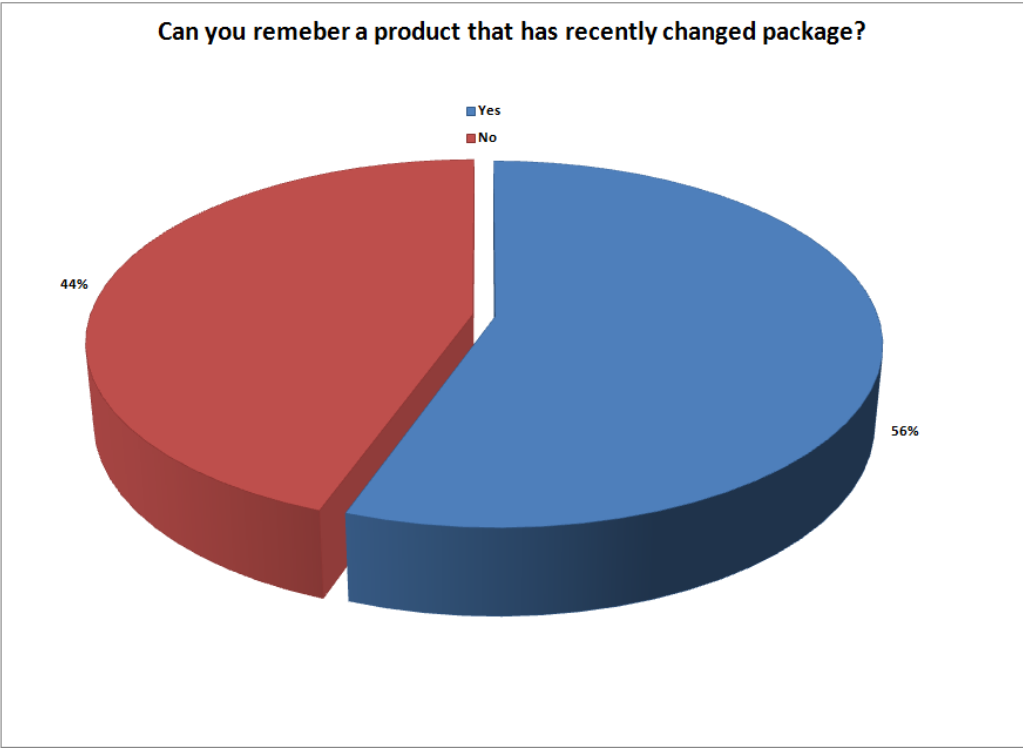
Improve the product's overall image 78%

QUESTION 9 : The percentage of persons who gave importance to the reasons are as follows:

Extremely and a lot	58%
A little	36%

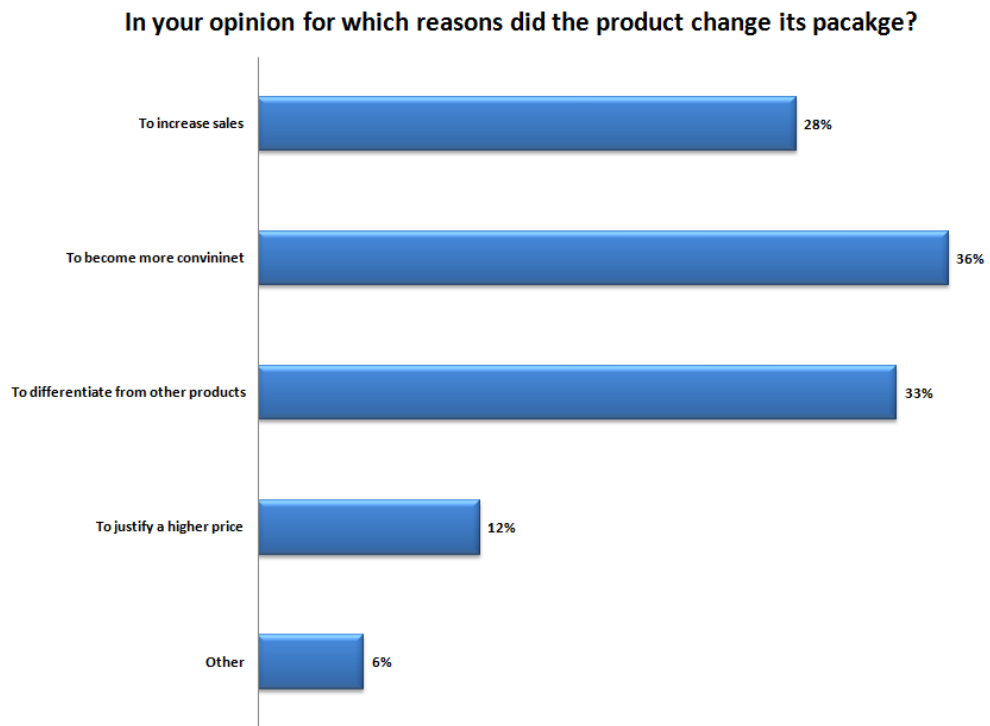


QUESTION 10 :



Yes	56%
No	44%

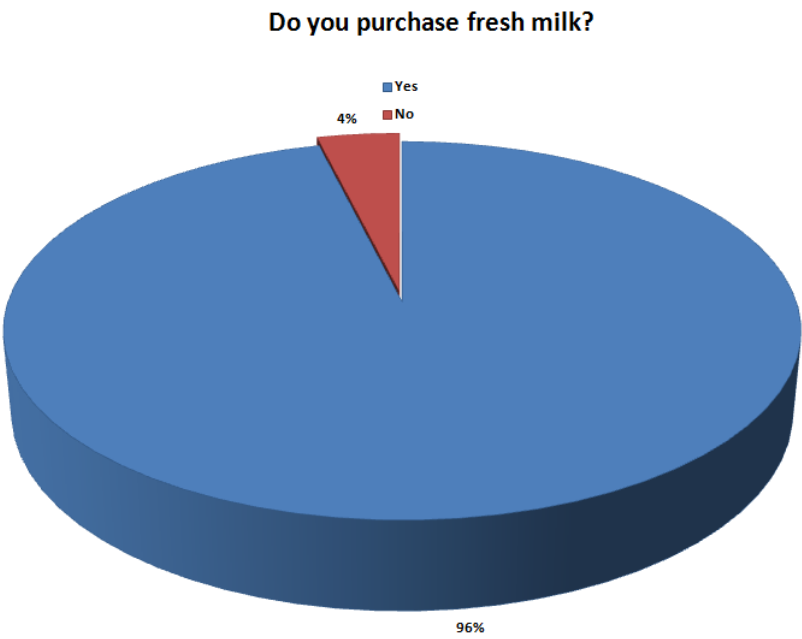
QUESTION 11: The reasons are given in the table below:



The three most important reasons are as follows :

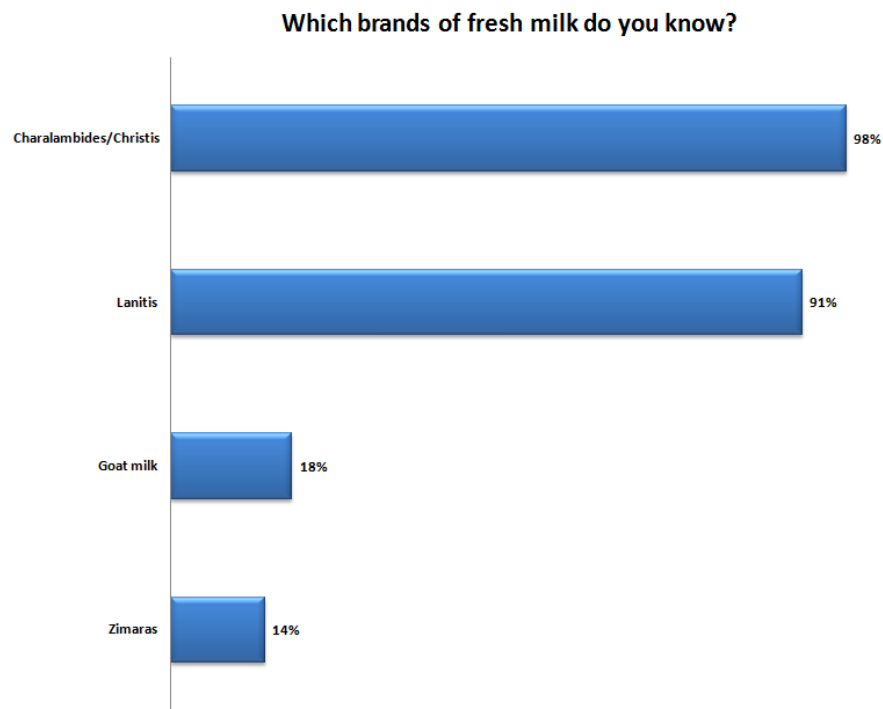
To become more convenient	36%
To differentiate it from other products	33%
To increase sales	28%

QUESTION 12 :



Yes 96%

QUESTION 13 : The answers are given in the table below:

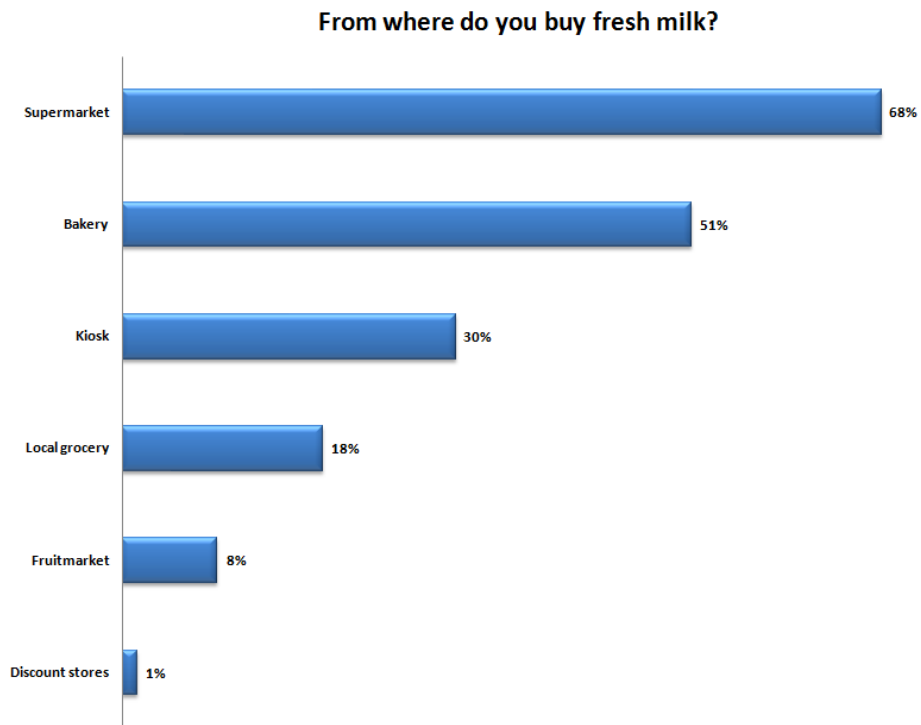


All participants (98%) of interviewees knew Charalambidis/ Christies and 92% Lanitis

QUESTION 14 Which fresh milk brand do you buy more often?

Charalambidis / Christis	57%
Lanitis	42%

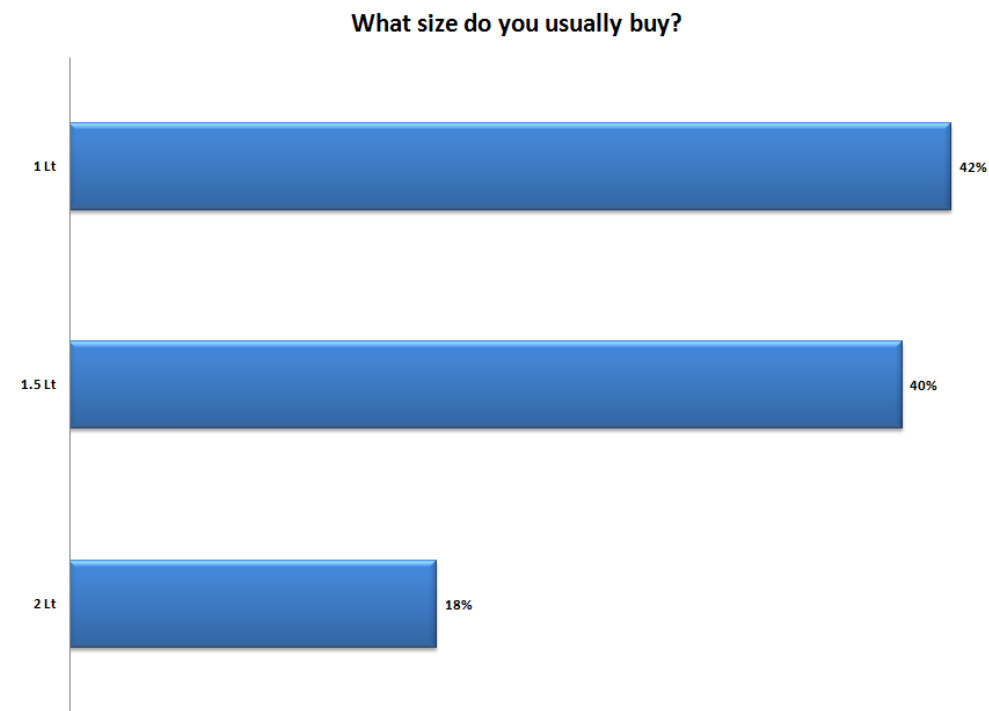
QUESTION 15 : The answers are given in the table below:



The three most important places for buying fresh milk are:

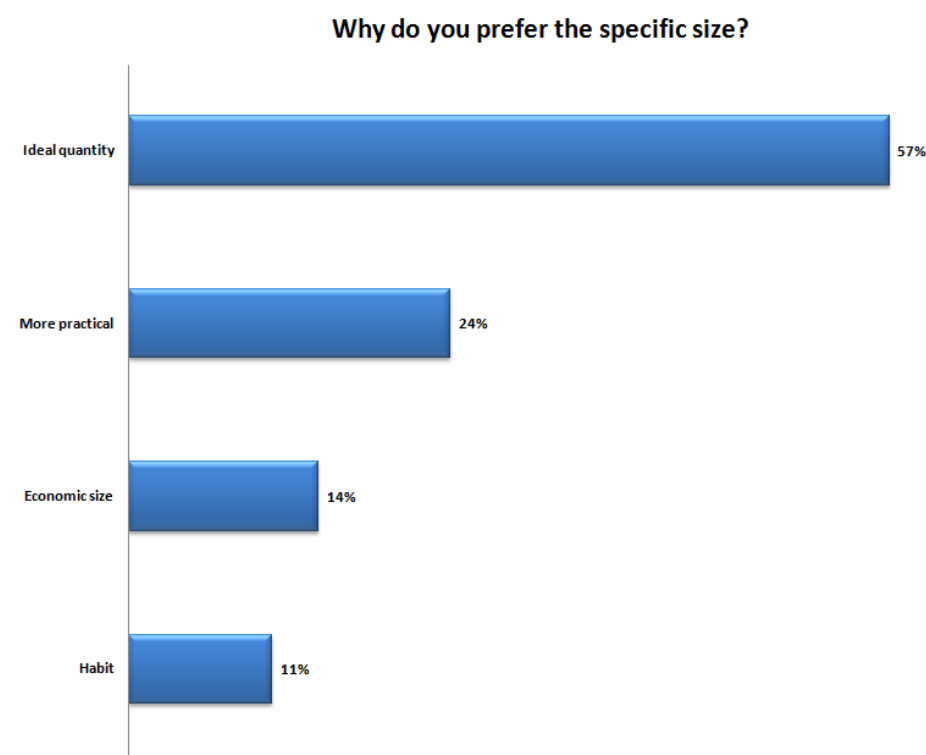
Supermarkets	68%
Bakeries	51%
Kiosks	30%

QUESTION 16 :



One liter	42%
One and a half liters	40%
Two liters	18%

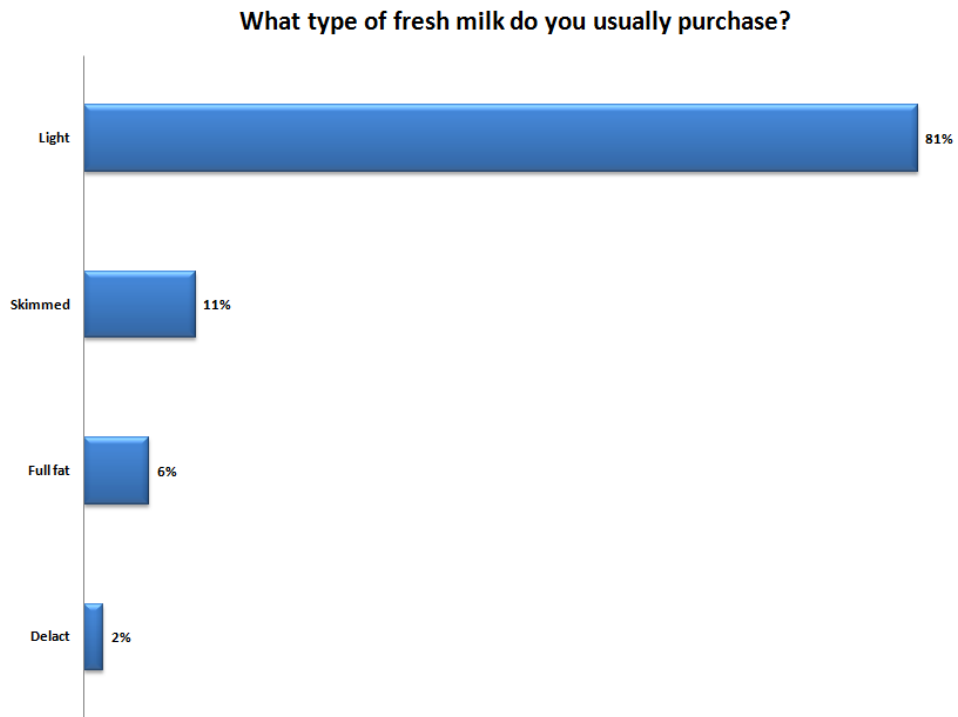
QUESTION 17 : The answers given by the persons interviewed are given in the table below:



The three most important reasons given for choosing the specific size are:

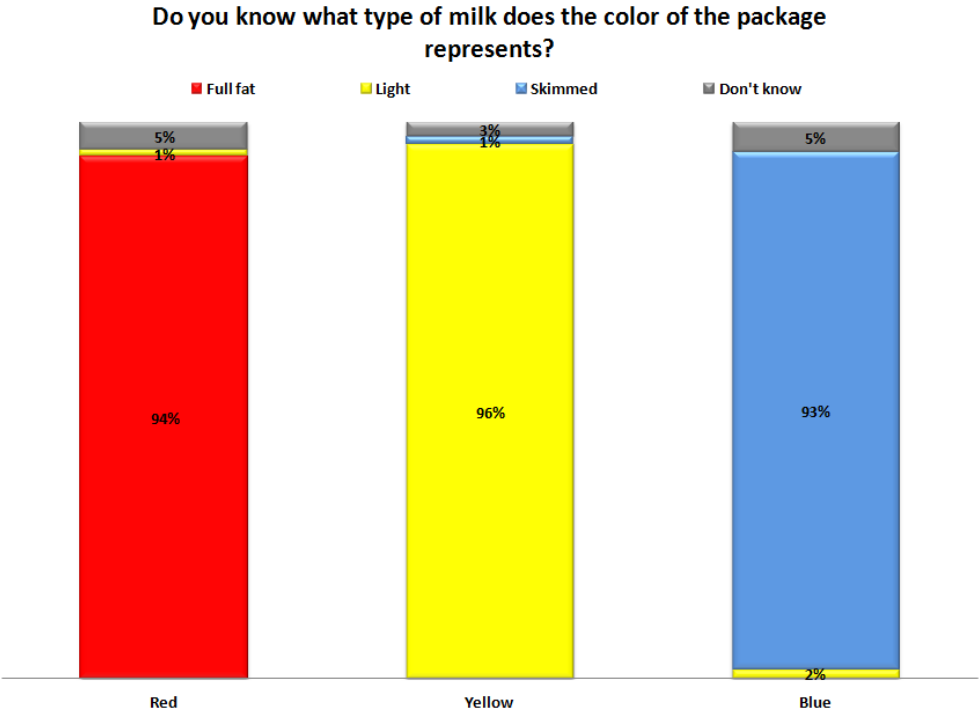
Ideal quantity	57%
More practical	24%
Economy size	14%

QUESTION 18 : The answers given by the interviewees are given in the tale below:



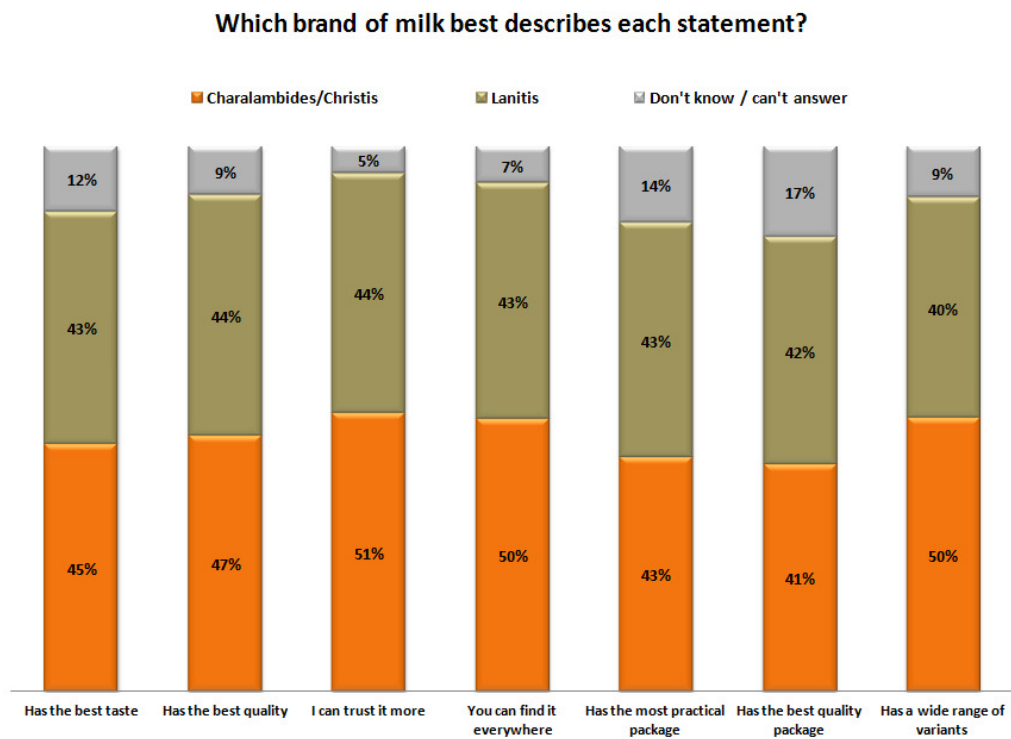
As can be seen from the table the purchases of full fat milk has fallen to a very low level while the purchases of light and skimmed milk have rose dramatically to 92%

QUESTION 19 :The answers given by the persons interviewed are given in the table below:



As can be seen from the table more than 90% of the persons interviewed knew what each color represented.

QUESTION 20 : The information given by the persons interviewed are given in the table below:

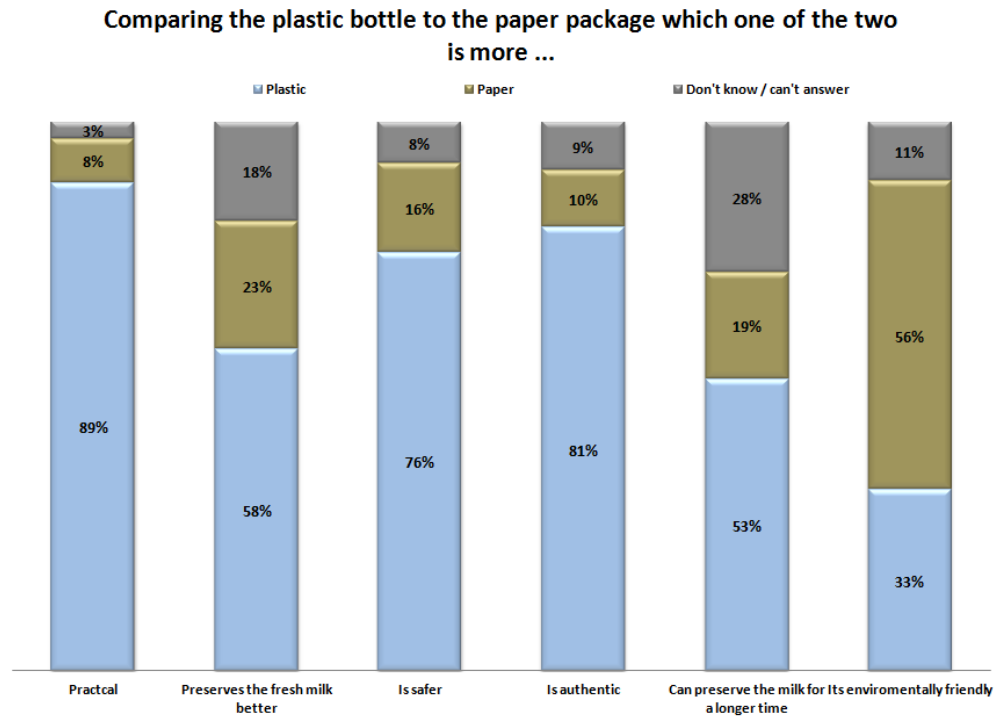


The replies in a different more clear way are as follows:

Statement	Charalambides/Christis	Lanitis
Has the best taste	45%	43%
Has the best quality	47%	44%
I can trust it more	51%	44%
I can find everywhere	50%	43%
Has the most practical package	43%	43%
Best quality package	41%	42%
Wide choice of variants	50%	40%

From the replies given by the persons interviewed it is clear that they have the perception that the Charalambides/Christies milk is superior in six out of the seven characteristics rated.

Question 21 :The answers of the interviewees are given in the table below:

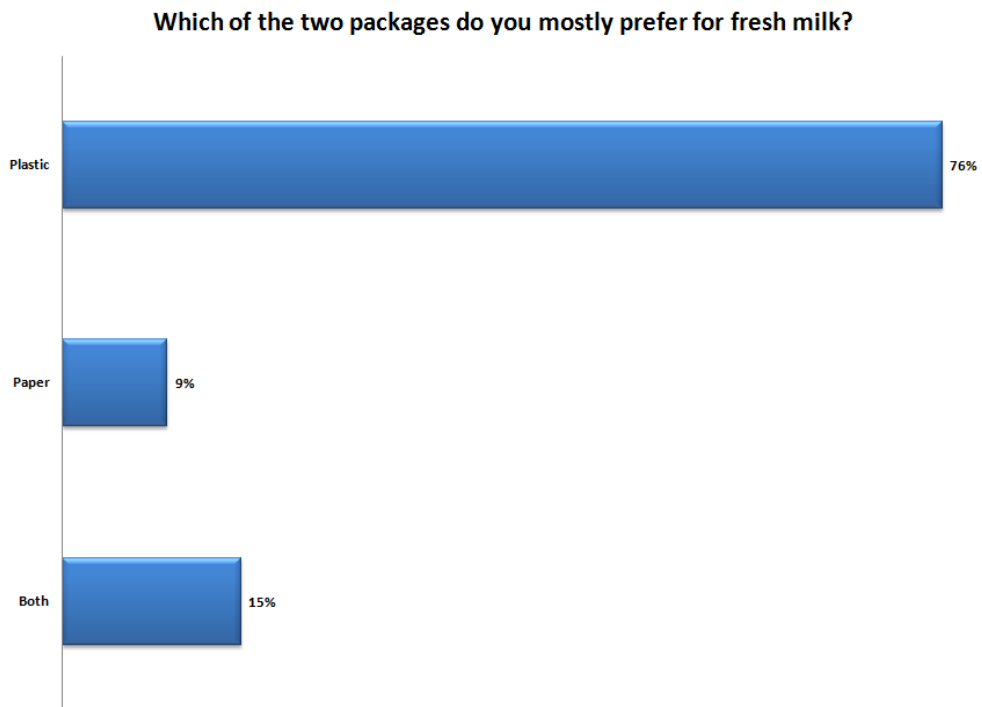


The replies in amore clear way are as follows:

Characteristic	plastic	paper	don't know
Practical	89%	8%	3%
Preserves the fresh milk better	58%	23%	19%
Safer	76%	16%	8%
Authentic	81%	10%	9%
Can preserve the milk longer	53%	19%	28%
Environmentally friendly	33%	56%	11%

Plastic is considered superior in all the characteristics except the environmentally friendly

QUESTION 22 : The replies of the person interviewed are given in the tale below:



Although the plastic is not environmentally friendly 76% of the persons interviewed prefer it.

Chapter 6

Conclusion and Recommendations

The starting point of the focus group and the questionnaire survey was the examination of which factors influenced the purchasing decisions for the fast moving consumer products in practice.

Specific questions were included in the questionnaire which required interviewees on a rating scale of «not of importance» to «very important» to rate factors which affected the purchase decision for fast moving consumer products such as milk.

6.1 Conclusions

The first factor affecting the purchase decision is SIZE which needs to be appropriate to the needs of the consumer. For example an one liter bottle of milk is too much for a pensioner living alone (I wonder why fresh milk companies stopped producing the half-liter carton) but it is r too little for a five member company. Another very recent example (in my opinion a marketing mistake) is the two liter plastic container (not the two liter bottle) which is too high to stand in the shelf of my refrigerator. So we can conclude that size is important in the purchase decision but the size must take into consideration the consumer preference and consumption habits. A final point about size is the question why fresh milk producers who bring out for children a small tetra-pack with chocolate or banana flavor, they do not produce the same small tetra – pack with ordinary plain milk. If the reason for not producing is technical or technological, the milk processors. if the believe that this is a market niche, they should try to solve the technical problem.

The second factor is SHAPE which surprisingly was rated by the interviewees as «somehow important». The Lanitis Company has put on the market a plastic bottle for its yellow light milk which is slim in the middle. Incidentally some people accused the company as trying to introduce Freudian ideas in the purchasing decision since the Lanitis bottle resembles the shape of a naked lady.

I agree that with the tetra-pack cartons very little can be done in term of shape but with plastic bottles there are many variations which can be done.

The third factor of packaging which can contribute to an increase in the market share is EASE OF USE which has been rated by the interviewers as «very important». The screw closing cap for every opening and closing of the carton and the wide bottom of the carton so that it will stand firm on the breakfast table are very good examples of easy to use.

The fourth factor of package which can contribute to the increase of market share is APPEARANCE which 42% of Interviewers rated as «very important» and «important». This belief is reinforced by the literature review where the appearance characteristics of milk packages were discussed especially the combination of colors white, green and blue with a touch of red can make the difference. Under this factor we could include other designer features such as symbols of cows, cows bells, green pastures, little stories which attract the consumer.

The fifth factor QUALITY which was rated as «very important» by 82% of the interviewees rightly is classified as a packaging feature since if the package is designed properly, it can pass the message of a quality product. In fresh milk selling this is very important since the supply of milk to the processors, as explained above, comes from the same cattle farm and is pasteurized by the same technology under strict HACCP regulations.

An interesting response of the interviewees which can help conclusions by the milk processors to take important packaging decisions is the replies they give to the question which reasons make companies change the package of their products. The reasons they gave in order of importance are:

- To become more competitive
- To differentiate it from other products
- To increase sales
- To justify higher price
- To be in-line with a new image of the company
- To follow or move away from competition

Although a product like milk which is consumed widely almost everyday, is expected that everybody knows the leading brands, it was satisfying to find out that over 90% of the interviewees could recall the names of the four national fresh milk suppliers.

The market shares of 57% for Charalambides / Christis and 42% for Lanitis, are roughly equal if it is taken into consideration that the 57% resulted from the cooperation of two suppliers.

An important conclusion of the research is from where consumers buy the fresh milk:

Supermarkets:	68%
Bakeries:	51%
Kiosk	30%
Local Grocery:	18%
Fruit Markets:	8%
Other (ie Discount stores):	1%

The figures do not add up to 100 because the interviewers were free to give more than one answer.

A surprisingly finding of the research is that more than 90% of the interviewees stated that they buy light or skimmed fresh milk.

In order to stress the importance of the need for innovative packaging for increasing market share, I will mention the response of the interviewers to the seven statements of the penultimate question on the questionnaire which asked the interviewees to state which company's milk fitted better each statement. The percentages were very close which means that there is very little differentiation between the fresh milk sold by Charalambides / Christis and Lanitis.

The final question of the questionnaire which had an over 90% rating by the interviewees is that for fresh milk they prefer the plastic package (bottle).

6.2 Recommendations

As it was summarized in the conclusions above packaging is a very good instrument for increasing market shares especially since the core product, fresh milk, is the same for all the processors who sell fresh milk through the various retail outlets.

Fresh milk processors should consider making changes in their milk packaging strategies based on the following findings of the project research

- packaging can increase market share create awareness and improve the product's image
- the size, the shape, the easy of use, the appearance and the quality if they are used properly can make the difference
- plastic bottles are preferred to paper packaging

The changing of the packaging is a very serious decision and professional advice is required from packaging design specialist as it was clearly mention in the literature review.

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Appendices

Appendix 1: Questionnaire

1. Σκεφτείτε ένα συσκευασμένο προϊόν που αγοράσατε πρόσφατα. Ποιοι λόγοι σας έκαναν να αγοράσετε το συγκεκριμένο προϊόν;

Αυτό αγοράζω πάντα (συνήθεια)	01
Έχει καλή ποιότητα	02
Η τιμή του (χαμηλή τιμή/ήταν σε προσφορά)	03
Το μέγεθος / οικονομική συσκευασία	04
Η εμφάνιση του	05
Το σχήμα (πρακτική συσκευασία)	06
Άλλο (σημειώστε)	19

2. Πόσο σημαντικοί είναι για εσάς οι πιο κάτω παράγοντες στην επιλογή και αγορά μίας συγκεκριμένης συσκευασίας; Χρησιμοποιήστε την κλίμακα 1 έως 5, όπου 1 σημαίνει καθόλου και 5 πολύ σημαντικός.

Μέγεθος	1	2	3	4	5
Σχήμα	1	2	3	4	5
Ευκολία στη χρήση	1	2	3	4	5
Εμφάνιση (χρώματα / design)	1	2	3	4	5
Ποιότητα	1	2	3	4	5

3. Σε ποιο βαθμό πιστεύετε ότι η συσκευασία ενός προϊόντος μπορεί να επηρεάσει τα ακόλουθα:

	Πολύ	Αρκετά	Λίγο	Καθόλου	ΔΓ/ΔΑ
Αύξηση πωλήσεων του προϊόντος	1	2	3	4	5
Αναγνωρισιμότητα προϊόντος	1	2	3	4	5
Δημιουργία καλύτερης αντίληψης για το προϊόν	1	2	3	4	5

4. Σε ποιο βαθμό θα λέγατε ότι σας επηρεάζει η εμφάνιση – συσκευασία ενός προϊόντος στο να το αγοράσετε;

Πολύ	1
Αρκετά	2
Λίγο	3
Καθόλου	4
ΔΓ/ΔΑ	5

5. Ποιοι κατά τη γνώμη σας είναι οι σκοποί του πακεταρίσματος;

Αύξηση πωλήσεων	1
Να τραβήξει την προσοχή του καταναλωτή	2
Περιγραφή των συστατικών (γενικά του περιεχομένου)	3
Προστασία του περιεχομένου / Διατήρηση	4
Άλλο (Σημειώστε)	9

6. Μπορείτε να θυμηθείτε κάποιο προϊόν στην αγορά το οποίο άλλαξε τη συσκευασία του;

Ναι	1	Πήγαινε επ.7
Όχι	2	Πήγαινε επ.8

7. Για ποιους λόγους πιστεύετε ότι άλλαξε η συσκευασία του συγκεκριμένου προϊόντος;

Αύξηση πωλήσεων	1
Για να γίνει πιο εύκολο στη χρήση του	2
Για να ξεχωρίσει από παρόμοια προϊόντα	3
Για να δικαιολογήσει τυχόν αύξηση της τιμής του	4
Άλλο (Σημειώστε)	9

8. Αγοράζετε φρέσκο γάλα;

Ναι	1	Πήγαινε επ.9
Όχι	2	ΔΗΜΟΓΡΑΦΙΚΑ

9. Ποιες μάρκες φρέσκου γάλακτος που υπάρχουν στην αγορά γνωρίζετε;

10. Ποια μάρκα φρέσκου γάλακτος αγοράζετε πιο συχνά;

	Ερ.9	Ερ.10
Χαραλαμπίδης-Κρίστης	1	1
Λανίτης	2	2
Αιγινό	3	3
Άλλη (σημειώστε.....)	9	9

11. Από πού αγοράζετε φρέσκο γάλα συνήθως; **ΠΟΛΛΑΠΛΕΣ ΑΠΑΝΤΗΣΕΙΣ ΑΠΟΔΕΧΤΕΣ**

Υπεραγορές	1
Συνοικιακά	2
Περίπτερα	3
Φρουταρίες	4
Discount stores	5
Άλλού (σημειώστε.....)	9

12. Ποιο μέγεθος συσκευασίας αγοράζετε συνήθως; **ΜΟΝΟ ΜΙΑ ΑΠΑΝΤΗΣΗ**

1 λίτρο	1
1.5 λίτρο	2
2 λίτρα	3

13. Για ποιο/ποιους λόγους προτιμάτε να αγοράζετε το συγκεκριμένο μέγεθος;

14. Ποιο είδος φρέσκου γάλακτος αγοράζετε συνήθως; **ΜΟΝΟ ΜΙΑ ΑΠΑΝΤΗΣΗ – Διάβασε επιλογές όχι όμως τα χρώματα**

Ολόπαχο (κόκκινο)	1
Ελαφρύ (κίτρινο)	2
Άπαχο (μπλε)	3

15. Γνωρίζετε ποιο είδος φρέσκου γάλακτος αντιπροσωπεύει το κάθε χρώμα συσκευασίας; **ΡΩΤΗΣΕ ΓΙΑ ΚΑΘΕ ΧΡΩΜΑ ΞΕΧΩΡΙΣΤΑ. ΔΙΑΒΑΣΕ ΕΠΙΛΟΓΕΣ**

	Ολόπαχο	Ελαφρύ	Άπαχο	ΔΓ/ΔΑ
Κόκκινο	1	2	3	4
Κίτρινο	1	2	3	4
Μπλε	1	2	3	4

16. Τώρα, θα σας διαβάσω ορισμένες προτάσεις που αφορούν το φρέσκο γάλα και θα ήθελα να μου πείτε ποια μάρκα φρέσκου γάλακτος πιστεύετε ότι περιγράφει καλύτερα η κάθε πρόταση

	Χαραλαμπίδης-Κρίστης	Λανίτης	Αιγινό	Άλλη μάρκα	ΔΓ/ΔΑ
Έχει την καλύτερη γεύση	1	2	3	4	5
Έχει την καλύτερη ποιότητα	1	2	3	4	5
Μπορώ να την εμπιστευτώ περισσότερο	1	2	3	4	5
Μπορείς να τη βρεις παντού	1	2	3	4	5
Έχει πιο πρακτική συσκευασία	1	2	3	4	5
Έχει πιο ανθεκτική/ποιοτική συσκευασία	1	2	3	4	5
Διαθέτει μεγάλη ποικιλία ειδών γάλακτος	1	2	3	4	5

17. Συγκρίνοντας το πλαστικό μπουκάλι με τη χάρτινη συσκευασία γάλακτος ποια θα λέγατε ότι...

	Πλαστική	Χάρτινη	ΔΓ/ΔΑ
Είναι πιο πρακτική/πιο βολική	1	2	3
Διατηρεί το γάλα πιο φρέσκο	1	2	3
Είναι πιο ασφαλής	1	2	3
Είναι πιο ανθεκτική	1	2	3
Μπορεί να διατηρήσει το γάλα περισσότερο καιρό	1	2	3
Πιο φιλική προς το περιβάλλον	1	2	3

18. Εσείς προσωπικά, ποιο από τα δύο είδη συσκευασίας προτιμάτε περισσότερο;

Πλαστική	1
Χάρτινη	2
Και τις δύο το ίδιο	3

ΔΗΜΟΓΡΑΦΙΚΑ

Δ1. Φύλο: Άνδρας ☐1 Γυναίκα ☐2

Δ2. Ηλικία: 18-24 ☐1 25-34 ☐2 35-44 ☐3 45-64 ☐4 65+ ☐5

Δ3. Αριθμός ατόμων στο νοικοκυριό: (σημείωσε)

Δ4. Επαρχία: Λευκωσία ☐1 Λεμεσός ☐2 Λάρνακα ☐3 Αμμόχωστος ☐4 Πάφος ☐5

Δ5. Περιοχή: Αστική ☐1 Αγροτική ☐2

Τηλέφωνο ερωτώμενου:

Όνομα ερευνητή: **Κωδικός ερευνητή:**

Ημερομηνία συνέντευξης:

Appendix 2: Statistical Tables

Page 1

Table 1

1. Think of a packaged product taht you have bought recently. For which reasons did you buy the specific productq
by DEMOGRAPHICS

Base: All respondents

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104		317	225	133	45	79
This is what I always buy (habit)	41%	35%	47%	38%	37%	46%	33%	70%		28%	43%	58%	47%	57%
Good quality	41%	40%	41%	48%	43%	39%	42%	26%		39%	51%	24%	31%	52%
Good price / promotion	30%	34%	26%	24%	28%	25%	40%	26%		36%	31%	21%	30%	22%
The size / economic package	9%	10%	8%	4%	14%	11%	9%	-%		13%	5%	3%	23%	9%
The appearance	5%	3%	6%	-%	10%	-%	5%	-%		6%	5%	5%	-%	-%
The shape (practical)	3%	3%	2%	-%	4%	3%	3%	-%		1%	2%	3%	7%	9%
Taste	1%	1%	1%	-%	3%	-%	-%	-%		-%	-%	-%	15%	-%
Other	1%	1%	1%	-%	1%	-%	2%	-%		-%	3%	-%	-%	-%

2

Table 2

2a. How important thjat are following elements for you in deciding what product to purchase? - Size
by 2. How important thjat are following elements for you in deciding what product to purchase?
Base: All respondents

		Size	Shape	Ease of use	Appeal	Quality
		800	800	800	800	800
Total						
Not at all important	(1.0)	7%	11%	5%	19%	1%
Somehow important	(2.0)	17%	28%	4%	20%	1%
Not so important	(3.0)	24%	22%	18%	19%	6%
Important	(4.0)	25%	22%	34%	25%	11%
Very important	(5.0)	27%	17%	39%	17%	82%
Don't know / can't answer		-%	-%	-%	-%	-%
Mean score		3.5	3.0	4.0	3.0	4.7

3
Table 3
2%a. How important thjat are following elements for you in deciding what product to purchase? - Size
by DEMOGRAPHICS
Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Not at all important	(1.0)	7%	7%	8%	4%	13%	4%	5%	6%	5%	9%	8%	8%	8%
Somehow important	(2.0)	17%	18%	17%	24%	13%	18%	18%	20%	22%	14%	19%	-%	18%
Not so important	(3.0)	24%	24%	23%	34%	24%	25%	20%	20%	29%	21%	19%	-%	30%
Important	(4.0)	25%	28%	21%	21%	28%	28%	21%	24%	19%	26%	37%	32%	17%
Very important	(5.0)	27%	24%	30%	17%	23%	25%	36%	30%	24%	30%	19%	60%	26%
Don't know / can't answer		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean score		3.5	3.4	3.5	3.2	3.4	3.5	3.6	3.5	3.3	3.5	3.4	4.4**	3.3

95 percent as lower case or *, 99 percent as UPPER CASE or **

4
Table 4
2%b. How important thjat are following elements for you in deciding what product to purchase? - Shape
by DEMOGRAPHICS
Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Not at all important	(1.0)	11%	4%	18%	11%	4%	7%	9%	37%	2%	17%	21%	-%	17%
Somehow important	(2.0)	28%	36%	21%	27%	29%	36%	24%	30%	32%	21%	29%	46%	22%
Not so important	(3.0)	22%	18%	26%	38%	24%	18%	20%	10%	32%	12%	13%	15%	31%
Important	(4.0)	22%	20%	23%	17%	27%	21%	23%	10%	19%	32%	13%	39%	8%
Very important	(5.0)	17%	21%	13%	7%	16%	18%	23%	13%	15%	17%	23%	-%	22%
Don't know / can't answer		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean score		3.0	3.2	2.9	2.8	3.2	3.1	3.3	2.3**	3.1	3.1	2.9	2.9	3.0

95 percent as lower case or *, 99 percent as UPPER CASE or **

5

Table 5

2%c. How important thjat are following elements for you in deciding what product to purchase? - Ease of use
by DEMOGRAPHICS

Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Not at all important	(1.0)	5%	5%	4%	-%	5%	4%	1%	17%	4%	-%	11%	8%	8%
Somehow important	(2.0)	4%	5%	4%	-%	1%	-%	8%	13%	5%	2%	8%	-%	4%
Not so important	(3.0)	18%	21%	15%	31%	11%	7%	23%	23%	21%	15%	19%	7%	21%
Important	(4.0)	34%	31%	38%	35%	43%	47%	26%	17%	32%	40%	37%	39%	22%
Very important	(5.0)	39%	38%	39%	34%	39%	43%	42%	30%	38%	43%	26%	46%	44%
Don't know / can't answer		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean score		4.0	3.9	4.0	4.0	4.1	4.2	4.0	3.3**	3.9	4.2*	3.6*	4.1	3.9

95 percent as lower case or *, 99 percent as UPPER CASE or **

Table 6

2% d. How important thjat are following elements for you in deciding what product to purchase? - Appearance
by DEMOGRAPHICS

Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Not at all important	(1.0)	19%	20%	17%	14%	10%	15%	18%	50%	18%	17%	27%	-%	21%
Somehow important	(2.0)	20%	22%	18%	27%	14%	18%	25%	20%	22%	6%	39%	23%	18%
Not so important	(3.0)	19%	20%	19%	21%	23%	18%	17%	16%	20%	26%	13%	8%	17%
Important	(4.0)	25%	21%	29%	21%	32%	29%	26%	6%	22%	28%	16%	47%	35%
Very important	(5.0)	17%	17%	17%	17%	22%	21%	14%	7%	19%	23%	5%	23%	8%
Don't know / can't answer		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean score		3.0	2.9	3.1	3.0	3.4**	3.2	2.9	2.0**	3.0	3.3*	2.3**	3.7	2.9

95 percent as lower case or *, 99 percent as UPPER CASE or **

7
Table 7
2%. How important thjat are following elements for you in deciding what product to purchase? - Quality
by DEMOGRAPHICS
Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Not at all important	(1.0)	1%	-%	2%	-%	1%	4%	-%	-%	1%	-%	-%	8%	-%
Somehow important	(2.0)	1%	1%	1%	-%	1%	4%	-%	-%	-%	3%	-%	-%	-%
Not so important	(3.0)	6%	8%	4%	10%	3%	3%	4%	13%	6%	5%	5%	-%	8%
Important	(4.0)	11%	15%	7%	10%	15%	7%	8%	13%	14%	11%	8%	7%	8%
Very important	(5.0)	82%	76%	87%	80%	80%	82%	88%	73%	78%	82%	87%	85%	83%
Don't know / can't answer		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean score		4.7	4.7	4.8	4.7	4.7	4.6	4.8	4.6	4.7	4.7	4.8	4.6	4.7

95 percent as lower case or *, 99 percent as UPPER CASE or **

8

Table 8

3%. To what extent do you believe that a product's package can influence the following - Increase sales
by 3. To what extent do you believe that a product's package can influence the following
Base: All respondents

		Inc rease sales	Inc rease aware ness	Im prove the prod uct's ov erall image
Total		800	800	800
Extremely	(4.0)	32%	41%	39%
A lot	(3.0)	43%	40%	39%
A little	(2.0)	11%	9%	8%
Not at all	(1.0)	5%	4%	7%
Don't know / can't answer		9%	6%	7%
Mean score		3.1	3.3	3.2

9

Table 9

3%. To what extent do you believe that a product's package can influence the following - Increase sales
by DEMOGRAPHICS

Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Extremely	(4.0)	32%	30%	34%	38%	31%	36%	34%	23%	30%	40%	28%	47%	17%
A lot	(3.0)	43%	43%	43%	45%	47%	43%	45%	27%	47%	44%	32%	39%	44%
A little	(2.0)	11%	14%	8%	3%	9%	7%	14%	23%	11%	6%	18%	15%	13%
Not at all	(1.0)	5%	6%	4%	10%	8%	7%	—%	3%	6%	5%	3%	—%	9%
Don't know / can't answer		9%	7%	11%	4%	6%	7%	8%	24%	7%	5%	19%	—%	17%
Mean score		3.1	3.0	3.2	3.1	3.1	3.2	3.2	2.9	3.1	3.3	3.1	3.3	2.8

95 percent as lower case or *, 99 percent as UPPER CASE or **

10

Table 10

3%b. To what extend do you beleive that a product's package can influence the following - Increase awareness by DEMOGRAPHICS

Base: All respondents

		GENDER		AGE					CITY				
	Total	Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104	317	225	133	45	79
Extremely	(4.0)	41%	41%	41%	52%	43%	39%	40%	30%	37%	42%	50%	34%
Alot	(3.0)	40%	40%	39%	38%	39%	43%	42%	36%	41%	46%	32%	35%
A little	(2.0)	9%	10%	8%	7%	9%	7%	8%	16%	13%	5%	5%	15%
Not at all	(1.0)	4%	4%	4%	-%	6%	3%	3%	3%	4%	5%	3%	-%
Don't know / can't answer		6%	4%	8%	4%	3%	7%	8%	13%	4%	3%	11%	-%
Mean score	3.3	3.2	3.3	3.5	3.2	3.3	3.3	3.1	3.2	3.3	3.4	3.4	3.2

95 percent as lower case or *, 99 percent as UPPER CASE or **

11

Table 11

3%c. To what extend do you beleive that a product's package can influence the following - Improve the product's overall image by DEMOGRAPHICS

Base: All respondents

		Total	GENDER		AGE					CITY				
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	CITY La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Extremely	(4.0)	39%	42%	37%	41%	48%	40%	38%	16%	45%	38%	31%	70%	17%
Alot	(3.0)	39%	36%	41%	52%	31%	46%	40%	36%	38%	45%	37%	30%	31%
A little	(2.0)	8%	9%	7%	3%	8%	-%	11%	17%	7%	5%	8%	-%	26%
Not at all	(1.0)	7%	6%	7%	3%	6%	7%	5%	13%	4%	9%	8%	-%	9%
Don't know / can't answer		7%	7%	8%	-%	7%	7%	6%	17%	5%	3%	16%	-%	17%
Mean score		3.2	3.2	3.2	3.3	3.3	3.3	3.2	2.7**	3.3	3.2	3.1	3.7*	2.7**

95 percent as lower case or *, 99 percent as UPPER CASE or **

12

Table 12

4. To what extent does the product's package influence you to purchase it?
by DEMOGRAPHICS

Base: All respondents

		Total	GENDER		AGE							CITY		
			Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total		800	400	400	101	273	97	225	104	317	225	133	45	79
Extremely	(4.0)	21%	27%	16%	17%	17%	25%	30%	16%	24%	23%	16%	15%	22%
Alot	(3.0)	37%	35%	38%	42%	52%	29%	31%	13%	38%	40%	21%	55%	39%
A little	(2.0)	36%	35%	38%	41%	32%	43%	37%	37%	38%	32%	42%	30%	35%
Not at all	(1.0)	4%	2%	6%	-%	-%	3%	-%	27%	-%	3%	19%	-%	-%
Don't know / can't answer		1%	1%	2%	-%	-%	-%	1%	7%	-%	2%	3%	-%	4%
Mean score		2.8	2.9*	2.7*	2.8	2.8	2.8	2.9	2.2**	2.9	2.8	2.3**	2.8	2.9

95 percent as lower case or *, 99 percent as UPPER CASE or **

13

Table 13

5. What is the reason for the package?

by DEMOGRAPHICS

Base: All respondents

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104	317	225	133	45	79
Increase sales	18%	17%	19%	21%	18%	18%	15%	20%	21%	20%	8%	24%	13%
To gain the consumer's attention	61%	63%	59%	72%	78%	50%	52%	33%	66%	61%	37%	77%	70%
To describe the ingredients	14%	10%	17%	7%	12%	21%	17%	10%	15%	17%	8%	16%	4%
To protect the product	29%	34%	25%	24%	25%	18%	37%	40%	18%	28%	50%	38%	39%
Other	3%	2%	4%	—%	—%	—%	3%	13%	—%	3%	11%	—%	—%

14

Table 14

6. Can you remember a product that has recently changed package?

by DEMOGRAPHICS

Base: All respondents

	Total	GENDER		AGE					Ni cosia	Lim assol	CITY		Am moch ostos	Pafos
		Men	Women	18-24	25-34	35-44	45-64	65+			La rnaka			
Total	800	400	400	101	273	97	225	104	317	225	133	45	79	
Yes	56%	52%	59%	49%	71%	53%	45%	46%	60%	45%	53%	78%	60%	
No	44%	48%	41%	51%	29%	47%	55%	54%	40%	55%	47%	22%	40%	

Table 15

7. In your opinion for which reasons did the product change its package?
by DEMOGRAPHICS

Base: All who can remember a product that has changes package

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	444	208	236	49	194	52	101	49	190	101	70	35	48
To increase sales	28%	27%	29%	21%	34%	20%	35%	7%	26%	34%	20%	40%	29%
To become more convininet	36%	31%	41%	44%	31%	33%	45%	35%	31%	38%	40%	59%	29%
To differentiate from other products	33%	40%	27%	35%	37%	47%	14%	42%	40%	28%	25%	30%	35%
To justify a higher price	12%	16%	8%	-%	7%	20%	20%	14%	11%	10%	10%	20%	14%
Other	6%	3%	8%	-%	5%	-%	10%	7%	6%	3%	15%	-%	-%

16

Table 16

8. Do you purchase fresh milk?

by DEMOGRAPHICS

Base: All respondents

	Total	GENDER		AGE					Ni cosia	Lim assol	CITY		Am moch ostos	Pafos
		Men	Women	18-24	25-34	35-44	45-64	65+			La rnaka			
Total	800	400	400	101	273	97	225	104	317	225	133	45	79	
Yes	96%	96%	96%	97%	94%	100%	95%	100%	95%	99%	95%	100%	96%	
No	4%	4%	4%	3%	6%	—%	5%	—%	5%	1%	5%	—%	4%	

17

Table 17

9. Which brands of fresh milk do you know?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Charalambides/Christis	98%	96%	99%	100%	99%	100%	95%	97%	100%	95%	95%	100%	100%
Lanitis	91%	91%	92%	82%	93%	89%	94%	93%	91%	95%	92%	85%	86%
Goat milk	18%	18%	18%	25%	15%	32%	13%	13%	15%	16%	17%	15%	37%
Zimaras	14%	11%	17%	7%	19%	7%	16%	7%	9%	14%	17%	24%	18%
Other	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Allo	2%	2%	3%	-%	3%	7%	2%	-%	1%	3%	6%	-%	-%

18

Table 18

10. Which brand of fresh milk do you buy most often?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Charalambides/Christis	57%	61%	53%	54%	62%	54%	61%	43%	60%	59%	59%	53%	41%
Lanitis	42%	37%	46%	46%	38%	39%	37%	57%	39%	38%	41%	47%	59%
Goat milk	1%	2%	-%	-%	-%	3%	2%	-%	-%	3%	-%	-%	-%
Zimaras	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	*%	-%	1%	-%	-%	4%	-%	-%	1%	-%	-%	-%	-%

19

Table 19

11. From where do you buy fresh milk?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Supermarket	68%	66%	69%	47%	72%	71%	74%	60%	71%	69%	61%	85%	50%
Local grocery	18%	22%	14%	21%	15%	18%	16%	26%	13%	20%	28%	7%	22%
Kiosk	30%	31%	29%	47%	35%	36%	21%	13%	25%	39%	22%	39%	27%
Fruitmarket	8%	11%	6%	4%	4%	17%	10%	13%	8%	11%	8%	7%	4%
Discount stores	1%	2%	1%	-%	3%	-%	-%	3%	1%	-%	-%	-%	9%
Bakery	51%	57%	44%	53%	44%	57%	56%	46%	47%	53%	56%	61%	45%
Other	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

20

Table 20

12. What size do you usually buy?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						Ni cosia	Lim assol	CITY			Am moch ostos	Pafos
		Men	Women	18-24	25-34	35-44	45-64	65+				La rnaka				
Total	769	383	386	97	256	97	214	104	300	222	125	45	76			
1 Lt	42%	42%	43%	40%	38%	29%	50%	54%	42%	33%	45%	31%	73%			
1.5 Lt	40%	43%	37%	43%	46%	32%	37%	36%	43%	50%	27%	46%	18%			
2 Lt	18%	15%	20%	18%	16%	39%	13%	10%	15%	17%	28%	23%	9%			

21

Table 21

13. Why do you prefer the specific size?
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Nicosia	Limassol	Larnaca	Amochostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
More practical	24%	26%	22%	18%	23%	29%	24%	29%	21%	31%	25%	24%	18%
Ideal quantity	57%	52%	63%	64%	54%	50%	60%	61%	55%	57%	58%	54%	68%
Economic size	14%	17%	12%	18%	19%	14%	13%	3%	20%	9%	8%	22%	14%
Habit	11%	11%	11%	25%	8%	10%	10%	7%	10%	11%	14%	8%	9%
Don't know / can't answer	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%

22

Table 22

14. What type of fresh milk do you usually purchase?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104		300	222	125	45	76
Full fat	6%	8%	5%	7%	7%	3%	3%	13%		2%	12%	8%	-%	5%
Light	81%	81%	81%	79%	80%	86%	82%	80%		84%	77%	83%	77%	82%
Skimmed	11%	11%	11%	14%	12%	7%	11%	7%		11%	9%	9%	15%	14%
Delact	2%	1%	3%	-%	1%	4%	3%	-%		2%	2%	-%	8%	-%

23

Table 23

15a. Do you know what type of milk does the color of the package represents? - Red
 by 15. Do you know what type of milk does the color of the package represents?
 Base: All who purchase fresh milk

	Red	Yellow	Blue
Total	769	769	769
Full fat	94%	-%	-%
Light	1%	96%	2%
Skimmed	-%	1%	93%
Don't know	5%	3%	5%

Table 24

15a. Do you know what type of milk does the color of the package represents? - Red
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Full fat	94%	94%	94%	93%	96%	93%	97%	83%	94%	94%	92%	85%	100%	
Light	1%	2%	1%	3%	1%	-%	-%	3%	1%	2%	-%	8%	-%	
Skimmed	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Don't know	5%	4%	6%	3%	3%	7%	3%	13%	5%	5%	8%	7%	-%	

25

Table 25

15%b. Do you know what type of milk does the color of the package represents? - Yellow
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos	
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Full fat	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Light	96%	96%	95%	97%	99%	93%	97%	90%	95%	97%	94%	93%	100%	
Skimmed	1%	2%	1%	3%	-%	-%	-%	7%	1%	2%	3%	-%	-%	
Don't know	3%	2%	4%	-%	1%	7%	3%	3%	4%	2%	3%	7%	-%	

26

Table 26

15%c. Do you know what type of milk does the color of the package represents? - Blue
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Full fat	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Light	2%	2%	2%	3%	1%	-%	-%	7%	1%	2%	3%	8%	-%	
Skimmed	93%	92%	94%	90%	97%	96%	97%	73%	95%	94%	83%	92%	96%	
Don't know	5%	6%	5%	7%	1%	4%	3%	20%	3%	5%	14%	-%	4%	

27

Table 27

16a. Which brand of milk best describes each statement? - Has the best taste
by 16. Which brand of milk best describes each statement?

Base: All who purchase fresh milk

	Has the best taste	Has the best qu ality	I can trust it more	You can find it every where	Has the most prac tical pa ckage	Has the best qu ality pa ckage	Has a wide range of var iants
Total	769	769	769	769	769	769	769
Charalambides/Christis	45%	47%	51%	50%	43%	41%	50%
Lanitis	43%	44%	44%	43%	43%	42%	40%
Goat milk	—%	1%	*%	—%	—%	—%	—%
Other brand	1%	1%	*%	—%	*%	*%	*%
Don't know / can't answer	11%	7%	4%	7%	14%	17%	9%

28

Table 28

16a. Which brand of milk best describes each statement? - Has the best taste
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Charalambides/Christis	45%	46%	44%	43%	48%	50%	43%	40%	49%	44%	45%	30%	45%	
Lanitis	43%	40%	45%	46%	38%	39%	42%	56%	43%	39%	42%	70%	41%	
Goat milk	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Other brand	1%	-%	2%	4%	-%	4%	-%	-%	1%	2%	-%	-%	-%	
Don't know / can't answer	11%	13%	8%	7%	13%	7%	15%	3%	7%	16%	14%	-%	14%	

Table 29

16b. Which brand of milk best describes each statement? - Has the best quality
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Charalambides/Christis	47%	48%	45%	47%	53%	43%	47%	37%	50%	45%	48%	46%	36%
Lanitis	44%	44%	44%	42%	37%	50%	44%	60%	45%	45%	36%	54%	45%
Goat milk	1%	-%	2%	4%	1%	-%	-%	-%	2%	-%	-%	-%	-%
Other brand	1%	1%	2%	4%	1%	4%	-%	-%	1%	2%	3%	-%	-%
Don't know / can't answer	7%	7%	6%	3%	8%	3%	10%	3%	1%	8%	14%	-%	18%

Table 30

16%c. Which brand of milk best describes each statement? - I can trust it more
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Charalambides/Christis	51%	53%	50%	61%	57%	50%	48%	37%	53%	53%	53%	53%	36%
Lanitis	44%	45%	44%	35%	41%	46%	44%	60%	45%	39%	47%	47%	50%
Goat milk	*%	-%	1%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%
Other brand	*%	-%	1%	-%	-%	4%	-%	-%	1%	-%	-%	-%	-%
Don't know / can't answer	4%	3%	5%	3%	1%	-%	8%	3%	-%	8%	-%	-%	14%

31

Table 31

16d. Which brand of milk best describes each statement? - You can find it everywhere
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Charalambides/Christis	50%	53%	47%	39%	54%	50%	56%	37%	57%	45%	50%	53%	32%	
Lanitis	43%	42%	44%	61%	34%	47%	39%	56%	39%	47%	39%	47%	55%	
Goat milk	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Other brand	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Don't know / can't answer	7%	5%	8%	-%	12%	3%	5%	7%	3%	8%	11%	-%	14%	

32

Table 32

16%. Which brand of milk best describes each statement? - Has the most practical package
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Charalambides/Christis	43%	45%	41%	43%	38%	46%	48%	40%	45%	41%	45%	46%	36%	
Lanitis	43%	40%	45%	50%	41%	39%	42%	46%	43%	47%	39%	54%	32%	
Goat milk	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Other brand	*%	-%	1%	-%	-%	4%	-%	-%	1%	-%	-%	-%	-%	
Don't know / can't answer	14%	15%	13%	7%	22%	11%	10%	13%	11%	12%	17%	-%	32%	

33

Table 33

16f. Which brand of milk best describes each statement? - Has the best quality package
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					Ni cosia	Lim assol	CITY			Am moch ostos	Pafos
		Men	Women	18-24	25-34	35-44	45-64	65+			La rnaka				
Total	769	383	386	97	256	97	214	104	300	222	125	45	76		
Charalambides/Christis	41%	42%	41%	50%	36%	46%	44%	37%	43%	42%	42%	30%	36%		
Lanitis	42%	39%	44%	39%	44%	39%	39%	46%	44%	39%	36%	70%	32%		
Goat milk	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%		
Other brand	*%	-%	1%	-%	-%	4%	-%	-%	1%	-%	-%	-%	-%		
Don't know / can't answer	17%	19%	14%	10%	20%	11%	18%	16%	11%	19%	22%	-%	32%		

34

Table 34

16%g. Which brand of milk best describes each statement? - Has a wide range of variants
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Charalambides/Christis	50%	52%	48%	47%	53%	50%	52%	43%	54%	51%	39%	38%	55%	
Lanitis	40%	37%	44%	50%	34%	43%	39%	47%	40%	36%	44%	62%	32%	
Goat milk	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
Other brand	*%	1%	-%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%	
Don't know / can't answer	9%	11%	8%	3%	12%	7%	10%	10%	5%	12%	17%	-%	14%	

35

Table 35

17a. Comparing the plastic bottle to the paper package which one of the two is more - Practcal
 by 17. Comparing the plastic bottle to the paper package which one of the two is more
 Base: All who purchase fresh milk

	Pra ctcal	Pres erves the fresh milk be tter	Is safer	Is auth entic	Can pre serve the milk for a lo nger time	Its envi romen tally fri endly
Total	769	769	769	769	769	769
Plastic	89%	58%	76%	81%	53%	33%
Paper	8%	23%	16%	10%	19%	56%
Don't know / can't answer	3%	18%	8%	9%	28%	11%

36

Table 36

17a. Comparing the plastic bottle to the paper package which one of the two is more - Practcal
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos	
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Plastic	89%	88%	90%	86%	89%	89%	89%	90%	90%	80%	97%	100%	91%	
Paper	8%	8%	8%	14%	7%	4%	8%	10%	7%	16%	3%	-%	4%	
Don't know / can't answer	3%	4%	2%	-%	4%	7%	3%	-%	3%	5%	-%	-%	4%	

37

Table 37

17%b. Comparing the plastic bottle to the paper

package which one of the two is more - Preserves the fresh milk better

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Plastic	58%	61%	56%	46%	52%	57%	61%	80%	59%	58%	69%	46%	50%
Paper	23%	25%	21%	43%	26%	21%	19%	10%	24%	23%	14%	31%	32%
Don't know / can't answer	18%	13%	23%	11%	22%	22%	19%	10%	17%	19%	17%	24%	19%

38

Table 38

17%c. Comparing the plastic bottle to the paper package which one of the two is more - Is safer
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos	
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Plastic	76%	75%	77%	82%	76%	71%	73%	84%	69%	75%	86%	85%	86%	
Paper	16%	18%	14%	11%	16%	21%	18%	13%	21%	20%	8%	7%	5%	
Don't know / can't answer	8%	6%	9%	7%	8%	7%	10%	3%	10%	5%	6%	8%	9%	

39

Table 39

17d. Comparing the plastic bottle to the paper package which one of the two is more - Is authentic
by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+		Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Plastic	81%	79%	82%	89%	80%	78%	74%	90%	78%	83%	89%	62%	81%	
Paper	10%	11%	10%	7%	8%	11%	16%	6%	10%	9%	9%	30%	5%	
Don't know / can't answer	9%	11%	7%	3%	12%	11%	10%	3%	11%	8%	3%	8%	14%	

40

Table 40

17%. Comparing the plastic bottle to the paper package which one of the two is more - Can preserve the milk for a longer time by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Plastic	53%	53%	54%	53%	42%	64%	53%	70%	53%	55%	61%	53%	36%
Paper	19%	22%	17%	22%	26%	11%	16%	16%	17%	21%	14%	23%	27%
Don't know / can't answer	28%	25%	30%	25%	33%	25%	31%	13%	30%	24%	25%	24%	37%

41

Table 41

17%f. Comparing the plastic bottle to the paper package which one of the two is more - Its enviromentally friendly

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	769	383	386	97	256	97	214	104	300	222	125	45	76
Plastic	33%	32%	33%	43%	20%	43%	31%	50%	29%	37%	36%	31%	32%
Paper	56%	57%	56%	50%	74%	43%	57%	30%	63%	47%	53%	69%	55%
Don't know / can't answer	11%	11%	11%	7%	5%	14%	13%	20%	8%	16%	11%	-%	14%

Table 42

18. Which of the two packages do you mostly prefer for fresh milk?

by DEMOGRAPHICS

Base: All who purchase fresh milk

	Total	GENDER		AGE						CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos	
Total	769	383	386	97	256	97	214	104	300	222	125	45	76	
Plastic	76%	77%	74%	75%	67%	75%	82%	84%	76%	69%	89%	77%	73%	
Paper	9%	9%	9%	11%	11%	11%	7%	7%	9%	12%	6%	-%	9%	
Both	15%	14%	17%	14%	22%	15%	11%	10%	15%	19%	6%	23%	18%	

43
Table 43
Δ1. Gender
by DEMOGRAPHICS
Base: All respondents

Page

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104	317	225	133	45	79
Men	50%	100%	-%	43%	52%	52%	54%	42%	56%	48%	38%	45%	55%
Women	50%	-%	100%	57%	48%	48%	46%	58%	44%	52%	62%	55%	45%

44
Table 44
Δ2. Age
by DEMOGRAPHICS
Base: All respondents

Page

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104	317	225	133	45	79
18-24	13%	11%	14%	100%	-%	-%	-%	-%	11%	15%	8%	-%	26%
25-34	34%	35%	33%	-%	100%	-%	-%	-%	36%	27%	34%	39%	43%
35-44	12%	13%	12%	-%	-%	100%	-%	-%	10%	17%	8%	23%	8%
45-64	28%	30%	26%	-%	-%	-%	100%	-%	37%	25%	18%	30%	18%
65+	13%	11%	15%	-%	-%	-%	-%	100%	6%	15%	32%	8%	4%

45
Table 45
Δ4. City
by DEMOGRAPHICS
Base: All respondents

	Total	GENDER		AGE					CITY				
		Men	Women	18-24	25-34	35-44	45-64	65+	Ni cosia	Lim assol	La rnaka	Am moch ostos	Pafos
Total	800	400	400	101	273	97	225	104	317	225	133	45	79
Nicosia	40%	45%	35%	35%	42%	32%	52%	20%	100%	-%	-%	-%	-%
Limassol	28%	27%	29%	35%	23%	39%	25%	33%	-%	100%	-%	-%	-%
Larnaka	17%	13%	21%	10%	17%	11%	11%	41%	-%	-%	100%	-%	-%
Ammochostos	6%	5%	6%	-%	6%	11%	6%	3%	-%	-%	-%	100%	-%
Pafos	10%	11%	9%	21%	13%	7%	6%	3%	-%	-%	-%	-%	100%